SHERWOOD MONTESSORI

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

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

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Passcode: 150836

Date/Time: **Thursday, August 24, 2023 – 6:00 p.m.**
**1017 16th St., Chico, CA Room 1**

## AGENDA

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

**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, Jolynn Aanenson, Tina Hansen-Lewis, Kati Boomgarden, Samantha Lawson

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. CONSENT AGENDA** (6:05)

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, June 15, 2023.

**B.2 Employee Handbook Approval** Consider approval of the 2023-2024 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 2023-2024 school year.

**B.4 Consolidated Application**

The Board will be asked to approve the Consolidated Application for categorical programs.

**B.5 Premium Only Plan Resolution**

The Board will be asked to approve the POP Resolution for 2023-2024

**B.6 MOU with Home Tech Charter** Consider approval of a contract to provide ELPAC assessment services to Home Tech Charter

**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 Election of Officers**

The Board will elect officers.

**ACTION REQUESTED:** Elect officers.

**G. FUTURE AGENDA ITEMS**

The Board will engage in retreat planning.

The Board will be asked to consider the Unaudited Actuals for the 2022-2023 school year.

**H. ADJOURNMENT** (7:15)

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SHERWOOD MONTESSORI

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

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+1 301 715 8592 US (Washington DC)
Meeting ID: 524 521 7471
Passcode: 150836
Find your local number: https://us02web.zoom.us/u/kc6eIi9MCH

Date/Time: **Thursday, June 15, 2023 – 6:00 p.m.**

## AGENDA

**A. CALL TO ORDER** (6:00 p.m.) *Meeting called to order at 6:12 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

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

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

**B.1 Commendations** Outgoing directors will receive commendations.

**B.2 Minutes Approval** Consider approval of minutes from Regular Meeting, May 18, 2023.
*Beth Hammer motioned to approve the minutes, Jolynn Aanenson seconded. All present board members approved the 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 School Director Report –** *Michelle Yezbick presented Report*
**E.2.2 Treasurer Report** - *Pat Casey presented 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.

*Pat Casey presented the 2023-2024 Original Budget*
*Jolynn Aanenson motioned to approve, Robyn Howley seconded. Budget approved by all present board members.*

**E.3.2 Local Control Accountability Plan (LCAP)**

A draft of the LCAP will be presented for adoption.
**ACTION REQUESTED:** Adopt the LCAP.

*Beth Hammer motioned to adopt the LCAP, Robyn Howley seconded. The board adopted LCAP.*

**E.3.3 Local Indicators Report**

A report of Local Indicators will be presented.
**ACTION REQUESTED:** Approve report.
*Jolynn Aanenson motioned to approve, Beth Hammer seconded. Board approved the report.*

**F.** **CLOSED SESSION** (7:00) *moved to closed session at 6:42 pm*

**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) *Meeting adjourned at 7 pm*



SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** August 24, 2023

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**SUMMARY**

Revisions in the Employee Handbook are submitted for approval.

**DISCUSSION**

This year, we are using a template created by Charter Safe, our insurance brokers, as the main body of the document for the Employee Handbook. Some sections of the previous handbook were incorporated into the new Employee Handbook.

The handbook was presented to employees at a mandatory all staff meeting. Any changes can be communicated via memorandum.

**ACTION REQUESTED**

Approve revisions to Employee Handbook.

Attachments: 2023-2024 Emplyee Handbook

SHERWOOD MONTESSORI

# Employee Handbook

2023-2024

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Addenda

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Non-Exempt Employee Meal and Rest Period Reporting Form
Organization Chart and Job Descriptions

# SECTION 1 – WELCOME

## WELCOME TO SHERWOOD MONTESSORI

We are happy to have you join us at Sherwood Montessori (or "Sherwood"). We believe our school is truly unique. We serve a diverse group of talented and hardworking students. We regard the work we do as being of utmost importance. Therefore, we have very high expectations for professionalism and performance for each one of our employees. All employees should treat all individuals, including students, teachers, administrators, volunteers, and family members, with respect, and approach all situations as opportunities to learn.

This handbook has been written to provide you with an overview of Sherwood Montessori, its personnel policies and procedures, and your benefits as a Sherwood Montessori employee.

This handbook is intended to explain in general terms those policies that most often apply to your day-to-day work activities. This handbook cannot anticipate every situation or answer every question about employment, and it is not an employment contract. Employees are expected to read this handbook thoroughly upon receipt, to know and abide by the policies outlined herein, and as revised over time, throughout their employment. No Sherwood Montessori guideline, practice, manual or rule may alter the "at-will" status of your relationship with Sherwood Montessori.

In order to retain necessary flexibility in the administration of its policies, procedures and benefits, Sherwood reserves the right to change, deviate from, eliminate, or revise the handbook, except for the at-will provisions, at any time, without notice, whenever Sherwood Montessori determines that such action is warranted. For these reasons, we urge you to check with the School Director to obtain current information regarding the status of any particular policy, procedure or practice. This handbook supersedes and replaces all previous personnel policies, practices and procedures.

I welcome you and wish you great success and fulfillment at Sherwood.

Sincerely

Michelle Yezbick

Director, Sherwood Montessori

# SECTION 2 – GENERAL

This handbook serves as a guide for the employer/employee relationship. This handbook applies to faculty and staff at Sherwood Montessori. The standards of conduct apply to all individuals who work on the school premises including independent contractors, vendors, and visitors. Unless otherwise indicated, a benefit, policy, program, or procedure applies, or is available, to ALL eligible employees.

This handbook contains only general information and guidelines. It is not intended to be comprehensive or to address all the possible applications of, or exceptions to, the general policies and procedures described. For that reason, if you have any questions concerning eligibility for a particular benefit, or the applicability of a policy or practice to you, you should address your specific questions to your supervisor or the School Director. You are responsible for reading, understanding, and complying with the provisions of this Handbook. Our objective is to provide you with a work environment that is constructive to both personal and professional growth.

Neither this handbook nor any other Sherwood Montessori document confers any contractual right, either express or implied, to remain in Sherwood Montessori's employ, nor does it guarantee any fixed term or condition of your employment. Except as otherwise provided in an executed employment agreement, your employment is not for any specified period of time and may be terminated at will, with or without cause and without prior notice, by Sherwood Montessori or you may resign for any reason at any time.

No supervisor or other representative of Sherwood Montessori except the School Director with the approval of the Board of Directors, has the authority to enter into any agreement for employment for any specified period of time, or to make any agreement contrary to the above. Second, the procedures, practices, policies and benefits described herein may be modified or discontinued from time to time with or without advance notice. We will try to inform you of any changes as they occur.

Finally, this handbook contains proprietary information that should not be disclosed outside Sherwood Montessori, other than to individuals affiliated with Sherwood Montessori whose knowledge of the information is required in the normal course of business.

# SECTION 3 – OUR MISSION/VISION/PHILOSOPHY

## 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

# SECTION 4 – EMPLOYMENT

## EMPLOYMENT APPLICATIONS

We rely upon the accuracy of information contained in the employment application and the accuracy of other data presented throughout the hiring process and employment. Any misrepresentations, falsifications, or material omissions in any of this information or data may result in exclusion of the individual from further consideration for employment or, if the person has been hired, termination of employment.

## AT WILL EMPLOYMENT

We believe that an employment relationship is successful as long as both parties are mutually satisfied. Accordingly, both you and Sherwood Montessori will have the right to terminate your employment and all related compensation and benefits at any time, with or without cause and with or without notice. In addition, Sherwood Montessori may eliminate or change any term or condition of your employment (including but not limited to your job assignment, duties, or salary) at will, at any time, for any reason not prohibited by law, with or without cause and with or without previous notice.

This is called "employment at will," and no one other than the School Director of Sherwood Montessori, with the approval of the Board of Directors, has the authority to alter your employment at-will status, to enter into an agreement for employment for a specified period of time, or to make any agreement contrary to this policy. Further, any such agreement must be in writing and must be signed by the School Director. Statements of specific grounds for termination set forth in this Handbook, or elsewhere, are not all-inclusive and are not intended to restrict Sherwood Montessori's right to terminate at-will.

## EQUAL EMPLOYMENT OPPORTUNITY

Sherwood Montessori is an equal opportunity employer. In accordance with applicable law, the School prohibits discrimination against any employee or applicant for employment on the basis of an individual's protected status, including race (which includes historically associated traits, such as hair styles and protective hairstyles, e.g., braids, locks, and twists), color, religious creed (which includes, without limitation to religious dress and grooming practices), gender, gender identity, gender expression, transgender identity whether or not the employee is transitioning or has transitioned, national origin (which includes, but is not limited to, national origin groups and aspects of national origin, such as height, weight, accent, or language proficiency), ancestry, physical disability (including HIV and AIDS), mental disability, medical condition (including cancer and genetic characteristics), genetic information, age (forty (40) and over), sexual orientation, marital status, registered domestic partner status, sex (which includes pregnancy, childbirth, breastfeeding, and related medical conditions), reproductive health decision-making (including but not limited to a decision to use or access a particular drug, device or product or medical services for reproductive health), military or veteran status (including state and federal active and reserve members as well as those ordered to duty or training), immigration/citizenship

status or related protected activities (which includes undocumented individuals and human trafficking), protected medical and other protected leaves, domestic violence victim status, political affiliation, or any other consideration protected by applicable law. These categories include a perception that the individual has any of these characteristics or is associated with a person who has (or is perceived to have) any of these characteristics. The School will ensure that applicants and employees are treated in all aspects of employment without unlawful discrimination because of these or any other protected basis. Such aspects of employment include, but are not limited to, recruitment, hiring, promotion, demotion, transfer, layoff, termination, compensation, and training.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, the School will make a good faith effort to provide reasonable accommodations for the known physical or mental limitations of an otherwise qualified applicant or employee with a disability, unless undue hardship would result to the School. An applicant or employee who believes they requires an accommodation in order to perform the essential functions of the job should contact the School Director and request such an accommodation, specifying what accommodation they need to perform the job. Although the need for accommodations is determined on a case-by-case basis, generally Sherwood Montessori and the employee or applicant will engage in an interactive process with the employee's or applicant's health care provider(s) to confirm the existence of the condition, its limitations in the workplace, and possible reasonable accommodations, if any. The employee or candidate has an obligation to cooperate with Sherwood Montessori in this process, which may include authorizing Sherwood Montessori to communicate with their health care provider(s).

If you believe you have been subjected to discrimination, please follow the complaint procedure outlined below.

## HARASSMENT

It is the policy of Sherwood Montessori to ensure equal employment opportunity without harassment on the basis of race (which includes historically associated traits, such as hair styles and protective hair styles, e.g., braids, locks, and twists), color, religious creed (which includes, without limitation, to religious dress and grooming practices), gender, gender identity, gender expression, transgender identity whether or not the employee is transitioning or has transitioned, national origin (which includes, but is not limited to, national origin groups and aspects of national origin, such as height, weight, accent, or language proficiency), ancestry, physical disability (including HIV and AIDS), mental disability, medical condition (including cancer and genetic characteristics), genetic information, age (forty (40) and over), sexual orientation, marital status, registered domestic partner status, sex (which includes pregnancy, childbirth, breastfeeding, and related medical conditions), reproductive health decision-making (including but not limited to a decision to use or access a particular drug, device or product or medical services for reproductive health), military or veteran status (including state and federal active and reserve members as well as those ordered to duty or training), immigration/citizenship status or related protected activities (which includes undocumented individuals and human trafficking), protected medical and other protected leaves, domestic violence victim status, political affiliation, or any other consideration made unlawful by federal, state, or local laws, ordinances, or regulations. These categories

include a perception that the individual has any of these characteristics or is associated with a person who has (or is perceived to have) any of these characteristics.

Sherwood Montessori prohibits any such harassment in the workplace. In addition, we prohibit abusive conduct/workplace bullying in the work environment. It is our mission to provide a professional work and learning environment free of harassment, discrimination and/or workplace bullying and that maintains equality, dignity, and respect for all. This policy protects all employees of the School as well as interns, volunteers, and potential employees (applicants). All employees of the School are required to abide by this policy, regardless of position or status, including supervisors, administration, and co-workers. In addition, this policy prohibits unlawful harassment by third parties, including students, parents, vendors or other third parties, who have workplace contact with our employees.

Conduct prohibited by these policies is unacceptable in the workplace and in any work-related setting outside the workplace, such as during business or field trips, meetings and business or school-related social events.

1 What is Harassment?

Harassment can take many forms. As used in this Employee Handbook, the term "harassment" includes all unwelcome conduct that comprises the following behavior pertaining to any of the above protected categories or characteristics:

Unlawful Harassment: Prohibited unlawful harassment may include, but is not necessarily limited to, the following behavior pertaining to any of the above protected categories:

- Verbal conduct such as flirting, epithets, derogatory jokes or comments, voicemails, slurs or unwanted sexual advances, sexually suggestive innuendos, conversations regarding sexual activities, invitations, or comments (including, but not limited to, threats of deportation against applicants and employees and family members of applicants and employees, derogatory comments about immigration status or disability, or mockery of an accent or a language or its speakers) ("hostile work environment" harassment).
- Disrespectful or unprofessional conduct based on any of the protected categories listed above ("hostile work environment" harassment).
- Comments or conduct that consistently target one gender, even if the content is not sexual ("hostile work environment" harassment).
- Visual conduct such as derogatory and/or sexually oriented posters, photography, cartoons, drawings, gestures, text messages, posts, social media, instant messages, e-mails, letters, pictures, or gifts ("hostile work environment" harassment).
- Physical conduct such as assault, unwanted touching, intentionally blocking normal movement, or interfering with work because of any protected basis ("hostile work environment" harassment).
- Threats and demands to submit to sexual requests or sexual advances as a condition of continued employment or to avoid some other loss and offers of employment benefits in return for sexual favors ("quid pro quo" harassment).

- Communication via electronic media of any type that includes any conduct that is prohibited by state and/or federal law and/or school policy.
- Sexually harassing conduct does need not to be motivated by sexual desire to be unlawful or to violate this policy and may include situations that began as reciprocal relationships but later ceased to be reciprocal.

2 What is abusive conduct/workplace bullying?

- Conduct of an employee in the workplace that a reasonable person would find hostile, threatening, intimidating, humiliating and unrelated to an employer's legitimate business interests. Examples may include:
  - Use of derogatory remarks, insults and/or epithets
  - Verbal or physical conduct that sabotages or undermines a person's work performance that is threatening, humiliating or intimidating
- Bullying, gossip, profanity, abusive conduct and negative comments are destructive to our School culture, create false rumors, disrupt school operations and interfere with the privacy of others.

3 What is Retaliation?

Retaliation against an individual for reporting or threatening to report harassment, discrimination or for participating in an investigation of a claim of such conduct is a serious violation of this policy and, like harassment or discrimination itself, will be subject to disciplinary action. Acts of retaliation should be reported immediately and will be promptly investigated and addressed.

As used in this policy, "retaliation" means taking any adverse employment action against an employee because the employee engaged in protected activity pursuant to this policy. Protected activity may include, but is not necessarily limited to, reporting or assisting in reporting suspected violations of this policy, cooperating or participating in investigations or proceedings arising out of a violation of this policy, or engaging in any other activity protected by applicable law.

As used in this policy, an "adverse employment action" means conduct or an action that materially affects the terms and conditions of the employee's employment status or is reasonably likely to deter the employee from engaging in further protected activity. Adverse employment actions may include, but are not limited to, the following: demotion; suspension; reduction in pay; denial of a merit salary increase; failure to hire or consider for hire; refusing to promote or consider for promotion because of reporting a violation of this policy; harassing another employee for filing a complaint; denying employment opportunities because of making a complaint or for cooperating in an investigation; changing an employee's work assignments for identifying harassment or other forms of discrimination in the workplace; treating an employee differently such as denying an accommodation; not talking to an employee (the "cold shoulder") when otherwise required by job duties; or otherwise excluding the employee from job-related activities because of engagement in activities protected under this policy.

Any retaliatory adverse action because of a protected activity will not be tolerated. If an employee believes they have been subjected to, has witnessed, or has knowledge of retaliation in violation of this policy, please follow the complaint procedure outlined below.

## 4 Responsibility

All Sherwood Montessori employees have a responsibility for keeping our work environment free of harassment, discrimination, retaliation and abusive conduct in accordance with this policy.

## 5 Reporting

Sherwood Montessori strongly encourages reporting of all perceived incidents of discrimination, harassment, abusive conduct or retaliation, regardless of the offender's identity or position. Individuals who believe that they have been subjected to such conduct should immediately discuss their concerns with their immediate supervisor, or the School Director. All employees who witness potential violations of this policy, and particularly supervisors, are required to immediately report such incidents to the School Director. Supervisors must report any and all conduct of which they are made aware, which violates, or may violate, policies regarding discrimination, unlawful harassment, or retaliation to the School Director as appropriate. Supervisors who fail to report alleged violations may be subject to disciplinary action, up to and including termination. There is no requirement to report your complaint to any designated supervisor within Sherwood Montessori. Select the individual supervisor with whom you feel the most comfortable discussing your complaint. Do not report your complaint to any individual who has allegedly engaged in the inappropriate behavior that is the subject of your complaint.

Every effort will be made to keep such reports as confidential as possible, although confidentiality cannot be guaranteed. Sherwood Montessori is serious about enforcing its policy against discrimination, harassment and retaliation; however, Sherwood cannot resolve potential violations that it does not know about. Therefore, employees are responsible for bringing any such problems to Sherwood Montessori's attention so it can take whatever steps are necessary to correct the problems.

All complaints submitted pursuant to this policy can be done in writing or verbally. Your complaint should be specific and should include the names of the individuals involved, the names of any witnesses, and any supporting documentation. Employees may choose to submit their complaints anonymously by filling a Google Form: Anonymous Complaint Form. The form will not collect your email, but you must use a Sherwood Montessori domain email to submit the form.

## 6 Investigation/Complaint Procedure

All complaints of unlawful harassment, discrimination or retaliation will be promptly investigated.

Sherwood Montessori encourages the prompt reporting of complaints or concerns so that rapid and appropriate remedial action can be taken before relationships become irreparably strained. Therefore, while no fixed reporting period has been established, early reporting and intervention have proven to be the most effective method of resolving actual or perceived incidents of harassment.

Sherwood Montessori's investigation methods will vary depending on the nature of the complaint, the allegations, the witnesses, and other factors. The investigation may include individual interviews with the parties involved and, where necessary, with individuals who may have

observed the alleged conduct or may have other relevant knowledge. Confidentiality will be maintained throughout the investigatory process to the extent possible and consistent with adequate investigation methods and appropriate corrective actions. The School has a compelling interest in protecting the integrity of its investigations. In every investigation, the School has a strong desire to protect witnesses from harassment, intimidation and retaliation, to keep evidence from being destroyed, to ensure that testimony is not fabricated, and to prevent a cover-up. If the School reasonably imposes a confidentiality requirement and you do not maintain such confidentiality, you may be subject to disciplinary action up to and including immediate termination.

All employees are required to fully cooperate with Sherwood Montessori's investigation, which includes, but is not limited to, providing all pertinent information in a truthful manner, submitting pertinent documents in their possession, not interfering with the investigation in any manner, and maintaining an appropriate level of discretion regarding the investigation. Failure to do so may result in disciplinary action, up to and including termination.

During the investigation, Sherwood Montessori will provide regular progress updates, as appropriate, to those directly involved. Sherwood Montessori will strive to complete its investigation as efficiently as possible in light of the allegations and will reach any conclusions based on the evidence collected and credibility of the witnesses.

Sherwood Montessori may investigate conduct in the absence of a formal complaint if the School has reason to believe that an individual has engaged in conduct that violates Sherwood Montessori policies or applicable law. Further, Sherwood Montessori may continue its investigation even if the original complainant withdraws their complaint during the course of the investigation.

Any conduct which Sherwood Montessori believes constitutes harassment, discrimination, abusive conduct, or retaliation in violation of this policy will be dealt with appropriately. Corrective action may include, for example, training, referral to counseling and/or disciplinary action such as warning, reprimand, withholding of a promotion or pay increase, reassignment, temporary suspension without pay or termination, as Sherwood believes is appropriate under the circumstances. Due to privacy protection, Sherwood may not be able to fully disclose its entire decision regarding corrective action to the complainant. False and malicious complaints of harassment, discrimination, abusive conduct, or retaliation as opposed to complaints, which, even if erroneous, are made in good faith, may be the subject of appropriate disciplinary action.

## 7 Conclusion

This policy was developed to ensure that all employees work in an environment free from harassment, discrimination, abusive conduct and retaliation. Any employee who has questions or concerns about these policies should talk with the School Director of Administrative Assistant.

If you believe you have experienced discrimination or harassment you may file a California Civil Rights Department ("CRD") or Equal Employment Opportunity Commission complaint. For information contact the CRD or EEOC. You may find their phone numbers online at www.eeoc.gov and www.calcivilrights.ca.gov, respectively.

8 Training Requirements

Sherwood Montessori requires all employees to abide by California's training requirements, which includes training within six months of hire and retraining every two years thereafter. Employees who fail to complete this required training will be subject to disciplinary action, up to and including termination.

## WHISTLEBLOWER POLICY

Sherwood Montessori is committed to maintaining a workplace where employees are free to raise good faith concerns regarding certain business practices, specifically: (1) reporting suspected violations of law, including but not limited to federal laws and regulations; (2) providing truthful information in connection with an inquiry or investigation by a court, agency, law enforcement, or other governmental body; and (3) identifying potential violations of Sherwood Montessori policy, specifically the policies contained in Sherwood Montessori's Employee Handbook.

An employee who wishes to report a suspected violation of law or Sherwood Montessori policy may do so by contacting the Board of Directors.

Sherwood Montessori expressly prohibits any form of retaliation, including harassment, intimidation, adverse employment actions, or any other form of retaliation, against employees who raise suspected violations of law, cooperate in inquiries or investigations, or identify potential violations of Sherwood Montessori. Any employee who engages in retaliation will be subject to discipline, up to and including termination.

Any employee who believes that they have been subjected to any form of retaliation as a result of reporting a suspected violation of law or policy should immediately report the retaliation to one of the following: School Director and Administrative Assistant. Any supervisor, manager, or administrative staff that receives complaints of retaliation must immediately inform the School Director or Administrative Assistant.

Reports of suspected violations of law or policy and reports of retaliation will be investigated promptly and in a manner intended to protect confidentiality to the extent possible, consistent with a full and fair investigation. Information will be disclosed only as it is necessary to complete the investigation and resolve the matter. The School Director and a member of Sherwood Montessori management will conduct the investigation or designate other internal or external parties to conduct the investigation. The investigating parties may notify the concerned individuals of their findings as appropriate.

## OPEN COMMUNICATION POLICY

We want to hear from you. Sherwood Montessori strongly encourages employee participation in decisions affecting their employment and their daily professional responsibilities. Our greatest strength lies in our employees and our ability to work together. We encourage open communication about all aspects of our school and organization. Employees are encouraged to openly discuss with their supervisors any problems or suggestions they believe would make our

organization better and stronger. Sherwood Montessori is interested in all our employee's success and fulfillment. We welcome all constructive suggestions and ideas.

Employees who have work-related concerns or complaints are encouraged to discuss them with the individual or individuals directly involved and/or the School Director. Employees are encouraged to raise their work-related concerns as soon as possible after the events that cause concern. Sherwood Montessori will attempt to keep the employee's concerns and complaints confidential to the extent feasible. However, in the course of resolving the matter, some dissemination of information to others may be necessary, appropriate, and/or required by law. Employees with concerns or complaints relating to harassment, discrimination or retaliation should follow the reporting procedure outlined in this Handbook.

## LACTATION ACCOMMODATION POLICY

Sherwood Montessori provides a reasonable amount of break time to accommodate an employee's need to express breast milk for the employee's infant child.

A private location to express breast milk will be provided in close proximity to the employee's work area. The employee's normal work area may be used if it allows the employee to express milk in private. In certain circumstances, a temporary location, multipurpose room, or shared space may be provided in accordance with applicable law. The location will also meet the following requirements: not be a bathroom or restroom; be free from intrusion; be shielded from view; be safe, clean, and free of toxic or hazardous materials; contain a surface to place a breast pump and personal items; contain a place to sit; and have access to electricity or alternative devices, including, but not limited to, extension cords or charging stations, needed to operate an electric or battery-powered breast pump. In addition, the School shall provide access to a sink with running water and a refrigerator suitable for storing milk in close proximity to the employee's work area. If a refrigerator cannot be provided, the School may provide another cooling device suitable for storing milk, such as a School-provided cooler.

An employee who would like to request an accommodation to express milk should complete an accommodation request form and contact the employee's supervisor or School Director. The School will engage the employee in an interactive process with the employee to determine when and where lactation breaks will occur, and will respond accordingly, generally within two business days. The School reserves the right to deny an employee's request for a lactation break if the additional break time will seriously disrupt operations.

Employees requesting an accommodation under this policy should comply with the following requirements:

1. The employee should complete an accommodation request form and contact their supervisor or the School Director to request designation of a location and time to express breast milk under this policy.

2. The requested break time should, if possible, be taken concurrently with other scheduled break periods. Non-exempt employees should clock out for any

lactation breaks that do not run concurrently with normally scheduled rest periods. Any such breaks will be unpaid.

Retaliation for making a lactation accommodation request is strictly forbidden. If the employee believes the employee has been retaliated against it should be reported immediately to Human Resources or the School Director. Discrimination against and harassment of lactating employees in any form is unacceptable will not be tolerated at Sherwood Montessori and will be handled in accordance with Sherwood Montessori's policy on discrimination and harassment.

If any employee believes that they have experienced retaliation or discrimination because of conduct protected by this policy, the employee may also file a complaint with their supervisor and/or the Labor Commissioner's Office. For more information, contact the Labor Commissioner's Office by phone or visit a local office by finding the nearest one on our website: www.dir.ca.gov/dlse/DistrictOffices.htm. The Labor Commissioner's Office provides an interpreter at no cost to the employee, if needed.

PUBLIC RELATIONS

The success of a charter school depends upon the quality of the relationship among the School, its employees, students, parents and the general public. The public impression of Sherwood Montessori and its interest in our school will be formed in part, by Sherwood Montessori employees. Our employees are ambassadors. The more goodwill an employee promotes, the more employees, students, parents and the general public will respect and appreciate the employee, Sherwood Montessori and our school's services.

Below are several things employees can do to help leave people with a good impression of Sherwood Montessori.

These are the building blocks for our continued success:

- Communicate with parents regularly
- Act competently and deal with others in a courteous and respectful manner
- Communicate pleasantly and respectfully with other employees at all times
- Follow up on requests and questions promptly, provide business-like replies to inquiries and requests, and perform all duties in an orderly manner
- Respond to email and voicemail within 24 hours during the workweek
- Take great pride in your work and enjoy doing your very best

## 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.

# SECTION 5 – THE EMPLOYMENT PROCESS

## EMPLOYEE CLASSIFICATIONS

Each Sherwood Montessori employee is either a "full-time," "part-time," or "temporary" employee and either an "exempt" or "non-exempt" employee. Some of the policies and benefits described in this handbook depend on whether the employee is full-time or part-time. Regular full-time employees are those employees regularly scheduled to work between 30 hours or more each week. Regular part-time employees are those regularly scheduled to work less than 30 hours each week. Temporary employees are those employed for short-term assignments or in connection with a specific project or event. Temporary employees are not eligible for employee benefits, except those mandated by applicable law.

Every member of the team is designated as an "Certificated employee" or "Classified employee." Some of the policies and benefits described in this handbook depend on how the employee is designated.

Exempt employees: This category includes all employees who are determined by the School to be exempt from certain wage and hour provisions of state and federal laws. Exempt employees are paid a fixed salary that is intended to cover all of the compensation to which they are entitled. Because they are exempt, such employees are not entitled to additional compensation for extra hours of work or time off in lieu of additional compensation.

Non-exempt employees: This category includes all employees who are covered by certain wage and hour provisions of state and federal laws. Non-exempt employees are entitled to overtime and double time pay as well as meal and rest breaks, as prescribed by law.

Instructional or Certificated Employee are those employees hired by Sherwood Montessori for the primary purpose of instructing students.

Non-Instructional or Classified Employees includes those employees hired by Sherwood Montessori that do not primarily instruct students, such as administrative, maintenance, assistants and other operational employees.

All employees will be assigned a work schedule suitable for their job assignment and will be expected to begin and end work according to the schedule. Please note that schedules may vary depending on a variety of factors including whether you work during the academic year or on an annual basis. The School Director or your supervisor will assign your individual work schedule. In order to accommodate the needs of our business, it may be necessary to change individual work schedules on either a short- term or long-term basis. All employees are expected to be at their desks or workstations at the start of their scheduled shift, ready to work. If you need to modify your schedule, request the change with Human Resources (at Sherwood this is the School Director

with support from the Administrative Assistant) or your supervisor. All schedule changes or modifications must be approved by the School Director.

Sherwood Montessori reserves the right to assign employees to jobs other than their usual assignment when necessary, provided the employee is capable of performing the essential functions of the alternate assignment. Non-exempt employees are not allowed to perform work at home or away from the School unless specifically authorized for each occurrence by their supervisor. Non-exempt employees are not to work before or to continue working after their scheduled hours unless specifically assigned by the supervisor. Non-exempt employees are not allowed to work "off the clock." Attendance at school-sponsored functions is not compensated unless the supervisor has required you to attend the function. Employees violating these rules may be subject to disciplinary action up to and including termination.

1 Instructional Employees:

The normal working hours for instructional employees at the school sites are from 8:30 a.m. to 3:30 p.m. with two ten (10) minute rest breaks and a sixty (60) minute meal break. During rainy day schedules, the meal break may be reduced to thirty (30) minutes for indoor recess. Instructional employees may be required to work other than the normal hours and to take their lunch breaks and/or rest breaks on a rotating basis so that classes and student activities are always covered. There will occasionally be activities that will require teacher participation outside of regular business hours such as instructional prep, evening and Saturday family workshops or special meetings. Teachers will have weekly meetings that extend the end of the work day by one hour: 4:30 p.m.

The School Director must approve any exceptions to the regular work schedule for instructional employees.

2 Non-Instructional Employees:

The School Director will determine the normal working hours for non-instructional employees. Non-exempt, non-instructional employees are entitled to two ten (10) minute rest breaks and a thirty (30) minute meal break and are entitled to overtime and double time pay as required by law.

Exempt employees, including Instructional and Non-Instructional employees, will be expected to work the number of hours necessary to complete their assigned responsibilities.

## WORKWEEK AND WORKDAY

Sherwood Montessori's workweek is from Monday at 7:00 A.M. through the following Friday at 6:00 P.M. Sherwood Montessori's standard workday is 8:30 a.m. to 4:30 p.m. each day.

## SCHOOL HOLIDAYS

The School observes 11 paid holidays during the year:

- New Year's Day

- Martin Luther King Day
- President's Day
- Memorial Day
- Independence Day
- Labor Day
- Veteran’s Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Eve Day
- Christmas Day

To be eligible for holiday pay, an employee must be full-time and non-exempt and must work both the business day before and after the holiday. Part-time employees, temporary employees, exempt employees (including, but not limited to, teachers) are not eligible for holiday pay. Exempt employees and teachers will receive their regularly scheduled pay during holidays.

Eligible employees will receive time off with pay at their regular rate of pay on the School-observed holidays listed above. When a holiday falls on a Saturday or Sunday, it is usually observed on the preceding Friday or following Monday. However, the School may close on another day. Holiday observance will be announced in advance. The School reserves the right to change this policy at any time, with or without notice.

Holiday hours do not count as hours worked for purposes of calculating overtime. For example, if you receive 8 hours of holiday pay on Monday and work 40 hours Tuesday-Saturday (8 hours/day), you will not be eligible for overtime.

Recognized religious holidays may be taken off by an employee whose religion requires observance of the particular day. Employees must request the day off in advance by written notice to the School Director. Exempt employees may use paid leave time if the employee has unused leave time available, otherwise the holiday will be unpaid.]All steps will be taken to reasonably accommodate a religious holiday (or practice) absent an undue hardship.

To qualify for holiday pay, all employees must work the last scheduled day before and the first scheduled day after the holiday unless the employee is absent:

- At the Supervisor’s request/approval
- Due to closure of schools because of inclement weather
- Prior to or following Jury Duty or Bereavement Leave
- Due to a previously scheduled and approved leave of absence

## ATTENDANCE AND PUNCTUALITY

Employees are expected to observe regular attendance and be punctual. Each of our employees is critical to our success. Therefore, regular attendance and punctuality are considered an essential

function of all positions. Employees are expected to report to work as scheduled, on time, and prepared to work. Employees also are expected to remain at work for their entire work schedule, except meal periods, rest periods or when required to leave on authorized School business. Late arrivals, early departures or other unanticipated and unapproved absences from scheduled hours are disruptive and must be avoided.

If you are unable to report for work on any particular day, you must call the Administrative Assistant at least one hour before the time you are scheduled to begin working for that day. If you call in less than one hour before your scheduled time to begin work, you will be considered tardy for that day. Absent extenuating circumstances or a medical provider's order excusing you from work for a period of time, you must call in on any day you are scheduled to work and will not report to work. The School understands that in some cases, advance notice is not possible. In these cases, notify the Administrative Assistant personally at the earliest possible moment. In some circumstances, you may be required to provide verification of or documentation for your absence.

More than three instances of non-illness related tardiness by any employee during any twelve-month period are considered excessive. Any unexcused absence is considered excessive.

If you fail to report for work without any notification to the Administrative Assistant and the absence continues for a period of three business days, the School will determine that you have abandoned your job and voluntarily terminated your employment.

Absences protected by local, state and federal law do not count as violations of this policy. Paid sick time protected under California law does not count as a violation of this policy.

## TIME SHEETS (NON-EXEMPT EMPLOYEES)

Non-exempt employees must accurately complete time sheets within the School's timekeeping system on a daily basis. Each time record must show the exact time each work period began and ended, the meal periods taken, and your signature. Absences and overtime must be accurately identified on your time record. Any work performed before or after any regularly scheduled work shift must be approved in advance by the employee's supervisor or school leadership. All time actually worked must be recorded. This includes the use of laptops, computers, PDAs or cell-phones to check work email, voicemail or to send text messages after hours. You cannot record time and/or submit a time record for another employee. Each employee must sign and submit their own time record. Non-exempt employees are not allowed to work "off the clock." Working "off the clock" violates our School's policy. Any errors on an employee's time record should be reported immediately to the employee's supervisor or Human Resources.

Time sheets must remain in the mailbox of the employee in the office. Employees may take a copy home, but the original time sheet must be updated daily and kept in the office. When calculating the total hours of a shift, round up to the nearest quarter hour. Time sheets should match the shifts assigned on the Conditions of Employment document. If an employee is substituting for another position, a Sub Time Sheet should be filled and the position the employee is substituting for must be indicated. Please ask the Administrative Assistant any questions you may have about filling the time sheet.

Exempt employees must report full days of absence from work. Planned absences must be recorded on the Absence Request form for both exempt and non-exempt employees. Planned and unplanned absences must be recorded on the Absence Verification form.

## MEAL AND REST PERIODS (NON-EXEMPT EMPLOYEES)

All non-exempt employees are provided with an opportunity to take meal and rest periods consistent with the law. During your meal periods and rest periods, you may not work at all. You are excused from all duties. In addition, please understand that you may not combine required meal or rest periods in order to take a longer break. Also, you may not miss a required meal or rest period in order to start work later or leave work earlier. In the rare event that you believe you cannot take a meal or rest period, or you are unable to take a full meal or rest period pursuant to School policy or you must begin your meal period more than five hours after your work period began, you must notify Human Resources in advance whenever possible (and, in any event, as soon as possible) so that the proper measures may be taken. If you leave the premises for either a meal or rest break, you are doing so for strictly personal reasons and will not be covered by worker's compensation.

Failure to comply with the School's policy regarding meal and/or rest periods can lead to discipline, up to and including termination.

### 3 Meal Periods

Non-exempt employees (hourly employees) scheduled to work more than five hours in a day are provided a 30-minute uninterrupted duty-free unpaid meal period. The meal period must be taken before the end of the fifth (5th) hour of work. For example, if the employee begins working at 7:00 a.m., then the employee must clock out to begin their meal period no later than 12:00 p.m. (noon). Your supervisor may schedule your meal periods.

The employee may waive this meal period if their workday will be completed within a total of six hours or less. To waive a meal period, the employee must receive prior written approval from the School Director and complete a "Meal Period Waiver" form.

If an employee's day exceeds ten hours of work time, the employee is entitled to an additional 30-minute uninterrupted duty-free unpaid meal break. The employee may only waive this second meal period if they have taken the required first meal break of at least 30 minutes and their workday will not exceed 12 hours. To waive the second meal period, the employee must receive prior written approval from theSchool Director and complete a "Second Meal Period Waiver" form.

| Hours Worked | Number of Meal Periods |
|---|---|
| 0 hours to 5 hours | No meal period |
| Over 5 hours to 10 hours | 1 30-minute meal period |
| Over 10 hours to 14 hours | 2 30-minute meal periods |

Non-exempt employees must observe assigned working hours, the time allowed for meal periods, and report any interrupted, missed, late or short meal periods on that days' time record and to the employee's supervisor immediately. The meal period must be accurately recorded on the employee's time sheet. Meal periods are unpaid time and employees are free to leave the premises. Meal periods may not be combined with rest periods or used to come in later or leave earlier on a workday. Non-exempt employees are expected to return to work promptly at the end of any meal period.

4 Rest Periods

Non-exempt employees are authorized and permitted to take a 10-minute uninterrupted rest period for each four (4) hours of work or major fraction thereof which is defined as any amount of time over two (2) hours. Your supervisor may schedule your rest periods. Rest periods should be taken as close to the middle of a work period as possible and cannot be taken in conjunction with a meal period. Rest periods are paid work time; they cannot be waived by the employee in order to shorten the workday or used towards additional time off. During rest periods, employees are not required to stay on the premises, however, non-exempt employees are expected to return to work promptly at the end of any rest period.

| Hours Worked | Number of Rest Periods |
|---|---|
| 3.5 hours to 6 hours | 1 10-minute rest period |
| Over 6 hours to 10 hours | 2 10-minute rest periods |
| Over 10 hours to 14 hours | 3 10-minute rest periods |

Non-exempt employees must observe assigned working hours, the time allowed for rest periods, and report any missed rest period on the days' time record and to the employee's supervisor immediately. Employees are encouraged to report any concerns regarding meal or rest periods to Human Resources.

5 Reporting Form

In addition to reporting it on their time record, any employee who misses a meal or rest period or who experiences a late, short, or interrupted meal period—for any reason—must immediately report this issue to their supervisor and complete a Non-Exempt Employee Meal and Rest Period Reporting Form. The employee must fill out all fields on the form, including providing a thorough explanation for the non-compliant meal or rest period. The employee must complete and turn in this form to the Administrative Assistant on the same workday that they experienced the non-compliant meal or rest period.

If an employee voluntarily chooses to miss a meal or rest period or take a late, short, or interrupted meal period (e.g., I chose to take my lunch later in the day or I chose to refuse an "authorized" meal period at the time provided by Sherwood Montessori), the employee is not entitled to premium pay (one additional hour of pay). If an employee involuntarily experiences a missed meal or rest period or a late, short, or interrupted meal period (e.g., my supervisor asked me to handle a call or meeting that caused me to miss or take a late meal period), the employee is entitled

to premium pay. Employees must report the reason for the non-compliant meal or rest period on the Non-Exempt Employee Meal and Rest Period Reporting Form.

## PAYDAYS

Paydays at Sherwood Montessori are the last business day of the month. The Office Manager or their designee will distribute checks to those who do not have direct deposit. If a normally scheduled pay day falls on a weekend or holiday, paychecks will be distributed the preceding business day. A written, signed authorization is required for mail delivery or for delivery of your paycheck to any other person. If you have automatic deposit for your paycheck, your funds will be deposited to the financial institution you requested by the end of business on the scheduled payday. While an automatic deposit may actually credit to your account before your actual "payday," the School is not responsible for automatic payments or withdraws dated prior to your actual payday and you should not depend on early deposits of your pay.

## PAYROLL WITHHOLDINGS

Sherwood is required by law to withhold Federal Income Tax, State Income Tax, Social Security (FICA), State Teachers Retirement Service (STRS for eligible credentialed faculty or PERS, for qualified members) and State Disability Insurance from each employee's paycheck as outlined below. Additionally, if a garnishment, tax levy, or an order to withhold child support payments should be delivered, Sherwood Montessori must comply with that order within the time allowed by law and cannot postpone the payroll deduction for any reason. Voluntary deductions, which must be authorized in writing by employees, may include retirement plans, employee portion of insurance premiums, or any other benefit made available to employees.

If an employee believes an error has been made in their pay or deductions Sherwood Montessori will work in good faith to resolve errors as soon as possible. The employee should notify the School Director of any errors in pay or deductions withheld within seven (7) days from the date paid.

Every deduction from the employee's paycheck is explained on the check voucher/paystub. If the employee does not understand the deduction, then they should ask the Administrative Assistant to explain it. The employee may change the number of withholding allowances they wish to claim for Federal and/or State Income Tax purposes before any pay period by filling out a new W-4 form and submitting it to the School Director.

# SECTION 6 – CONDITIONS OF EMPLOYMENT

## IMMIGRATION LAW COMPLIANCE

Sherwood Montessori employs only those authorized to work in the United States in compliance with the Immigration and Control Act of 1986. Each new employee, as a condition of employment, must complete the Employment Eligibility Verification Form I-9 no later than the first day of work for pay and present original documentation establishing identity and employment eligibility as outlined on the I-9 instruction forms no later than three business days after they begin work. Former employees who are rehired must also complete the form if they have not completed an I-9 with Sherwood Montessori within the past three years or if their previous I-9 is no longer retained or valid.

## CREDENTIAL REQUIREMENTS

If you are a credentialed team member, you must provide copies of your credential, certificate of clearance, transcripts, and test scores prior to your first day of actual work and if already employed, prior to the start of the academic year if applicable. Failure to provide these documents may delay your ability to begin work.

You are also responsible for keeping required certificates, credentials, and registrations current and in good standing, for paying the costs associated with renewal, and for providing both your principal and the School with verification of renewals. Failure to provide these updated documents to the School may result in suspension without pay until such time as the necessary documentation has been provided.

## TUBERCULOSIS TEST

Before the first day of employment, all new employees must have had a tuberculosis test as described in Education Code 49406 or a TB Risk Assessment (pursuant to AB1667) within the past 60 days. Employees transferring from other public or private schools within the State of California must either provide proof of an examination or a completed Risk Assessment within the previous 60 days or a certification showing that they were examined within the past four (4) years and was found to be free of communicable tuberculosis. The current physician's statement or Risk Assessment must be on file in the office before the first day of employment. Failure to provide documentation on time may result in delay of your ability to begin work or termination.

Results of these tests are strictly confidential. TB Clearance is good for four years and it is the employee’s responsibility to remain in compliance and ensure the school has a valid certificate on file.

The examination for applicants for employment is a condition of initial employment. Therefore, the expense incident thereto shall be borne by the applicant. The cost of the examination required for existing employees shall be a reimbursable expense. Employees should follow the School’s reimbursement procedures.

## CRIMINAL BACKGROUND CHECK

All employees must have Live Scan fingerprint results on file with Sherwood Montessori in accordance with applicable law. Live Scan fingerprinting will be required of all job applicants, employees, and volunteers as required by California and federal law. These background checks are performed through a fingerprinting service coordinated by the California Department of Justice (DOJ) and the Federal Bureau of Investigation (FBI). Civil or criminal background checks may also be required of applicants and/or employees based on job duties or any other factors in accordance with applicable law.

Employees with adverse background information (such as certain specific criminal convictions) may be ineligible for employment with Sherwood Montessori.

Sherwood Montessori shall also request subsequent arrest notification from the Department of Justice and take all appropriate action based upon such further notification in accordance with applicable law.

## CHILD ABUSE AND NEGLECT REPORTING ACT

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 neglect, or you reasonably suspect it, California Penal Code Section 11166 requires you to immediately report this information or suspicion to a child protective agency or the police. The report shall be made by phone as soon as possible and a subsequent written report must be sent within 36 hours of your knowledge or suspicion of the abuse. Failure to meet these obligations can result in a monetary fine and/or jail.

While each employee has the responsibility to ensure the reporting of any child they suspect is a victim of abuse, the employee is not to verify the suspicion or prove that abuse has occurred. It is extremely important that Sherwood Montessori employees comply with the requirements of the Child Abuse and Neglect Reporting Act (CANRA). No mandated reporter can be held civilly or criminally liable for any report required or authorized by CANRA.

The School Director is available to answer any questions employees may have about their responsibilities under CANRA, or to assist an employee in making a report under CANRA. If an employee makes a report pursuant to CANRA without Sherwood Montessori's assistance, they are required to notify Sherwood of the report if it is based on incidents they observed or became aware of during the course and scope of their employment with Sherwood Montessori.

## FIRST-AID AND CPR TRAINING

All individuals working unsupervised with children or in a classroom setting (i.e. core teachers, advisors, coaches, non-core teachers, administrators) must receive, renew, and maintain basic first-aid and CPR certification by the first day of school. Any employee required to be first aid certified and hired after the beginning of the school year will be required to provide proof of completion of both First Aid and CPR training prior to the first day of work.

For additional information on the training required, please contact the Administrative Assistant.

## PERSONNEL FILES

An employee or former employee (or designee) has the right to inspect or receive a copy of their personnel records at reasonable times, at a reasonable place, and on reasonable advance notice to the Administrative Assistant. All requests should be put in writing preferably on the form maintained by Administration. If the request includes a request for copies the employee or former employee may be required to pay for the actual costs of copying. Employer will respond to such a request within 30 days of receipt of the written request.

Employees are not entitled to inspect or copy: letters of reference, records that relate to an investigation of possible criminal activity, ratings, reports or records obtained prior to employment, prepared by examination committee members or obtained in connection with a promotional examination.

## CHANGES IN EMPLOYMENT

An employee is responsible for notifying the Office Manager about changes in the employee's personal information and changes affecting the employee's status (for example, name changes, address or telephone number changes, marriages or divorces, etc.). This notification by the employee must occur as close to the change as possible, but no later than 30 days following the change.

# SECTION 7 – PERFORMANCE

## EMPLOYEE PERFORMANCE REVIEW

Supervisors will generally conduct performance reviews with all regular full-time and regular part-time employees annually. Supervisors may conduct informal performance reviews and goal setting sessions more often if they choose.

Performance reviews are designed for the supervisor and the employee to discuss their current job tasks, encourage and recognize attributes, and discuss positive, purposeful approaches for meeting work-related goals. Together, the employee and supervisor discuss ways in which the employee can accomplish goals or learn new skills. The goal setting sessions are designed for the employee and their supervisor to make and agree on new goals, skills, and areas for improvement.

It is important to prepare for these reviews carefully, and participate in them fully.

# SECTION 8 – LEAVES

## FAMILY MEDICAL LEAVE ACT (FMLA)/CALIFORNIA FAMILY RIGHTS ACT (CFRA)

Eligible employees may request a family and medical leave of absence under the circumstances described below. Eligible employees are those who have been employed by the School for at least 12 months (not necessarily consecutive), have worked at least 1250 hours during the 12 months immediately prior to the family and medical leave of absence. For purposes of FMLA leave, an eligible employee must also be employed at a worksite where there are 50 or more employees of the School within 75 miles. Please check with the School Director to determine whether you are eligible for FMLA/CFRA leave.

Ordinarily, you must request a planned family and medical leave at least 30 days before the leave begins. If the need for the leave is not foreseeable, you must request the leave as soon as practicable. You should use the School's request form, which is available upon request from the Administrative Assistant. Failure to comply with this requirement may result in a delay of the start of the leave.

A family and medical leave may be taken for the following reasons:

1. the birth of an employee's child or the placement of a child with the employee for foster care or adoption, so long as the leave is completed within 12 months of the birth or placement of the child;

2. the care of the employee's spouse, child, parent with a "serious health condition";

3. for CFRA only, the care of the employee's "family member with a "serious health condition";

4. the "serious health condition" of the employee;

5. for FMLA only, the care of the employee's spouse, child, parent, or next of kin who is a member of the Armed Forces, including a member of the National Guard or Reserves, and who is undergoing medical treatment, recuperation, or therapy, is otherwise in outpatient status, or is otherwise on the temporary disability retired list, for a serious injury or illness; or

6. any qualifying exigency as defined by the applicable regulations arising out of the fact that the employee's spouse, child, registered domestic partner (CFRA only) or parent is on active duty (or has been notified of an impending call or order to active duty) in the Armed Forces.

For CFRA only, a "family member" includes the employee's spouse, parent, child of any age, registered domestic partner, grandparent, grandchild, sibling, parent-in-law, and a "designated person". A "designated person" is someone else with a blood or family-like relationship with the employee. The employee may identify this person at the time the employee requests a CFRA leave. The employee is limited to one (1) designated person per 12-month period for purposes of a CFRA leave.

A "serious health condition" is one that requires inpatient care in a hospital or other medical care facility or continuing treatment or supervision by a health care provider. You may take a leave under paragraph (2) or (3) above only if due to a serious health condition of a family member as described in paragraph (2) or (3) requires your care or assistance as certified in writing by the family member's health care provider. If you are seeking a leave under paragraph (4) above, you must provide the School with a medical certification from your health care provider establishing eligibility for the leave, and you must provide the School with a release to return to work from the health care provider before returning to work. You must provide the required medical certification to the School in a timely manner to avoid a delay or denial of leave. You may obtain the appropriate forms from the Administrative Assistant.

FMLA/CFRA leave is unpaid and both may be taken for up to 12 workweeks during the designated 12-month period (with the exception of FMLA qualifying leaves to care for a member of the Armed Services who has a serious illness or injury, which may be taken for up to a total of 26 workweeks of leave during a single 12-month period). The 12-month period will be defined as a "rolling twelve months" looking backward over the preceding 12 months to calculate how much family and medical leave time has been taken and therefore determine the amount of leave that is available. FMLA qualifying leaves to care for a member of the Armed Services who has a serious illness or injury will be calculated on the 12-month period looking forward. All time off that qualifies as family and medical leave will be counted against your state and federal family and medical leave entitlements to the fullest extent permitted by law.

You will be required to use any accrued leave time during unpaid family and medical leave (e.g. for example, any period in which you are not receiving a wage supplement through the EDD). You will also be required to use any accrued paid sick leave during unpaid family and medical leave that is due to your own or a family member's serious health condition. However, if an employee is receiving benefit payments pursuant to a disability insurance plan (such as California's State Disability Insurance plan or Paid Family Leave program) or workers' compensation insurance plan, the employee and the School may mutually agree to supplement such benefit payments with available leave and/or paid sick leave.

Benefit accrual, such as leave time, PSL, and holiday benefits, will be suspended during the approved leave period and will resume upon return to active employment. During FMLA/CFRA leave, group health benefits will be maintained as if you were continuously employed. However, you must continue to pay your share of applicable premiums (for yourself and any dependents) during the leave.

If you do not return to work on the first workday following the expiration of an approved FMLA/CFRA leave, you may be deemed to have resigned from your employment. Upon returning from such a leave, you will normally be reinstated to your original or comparable position and will receive pay and benefits equivalent to those you received prior to the leave, as required by law. In certain circumstances under FMLA, "key" employees may not be eligible for reinstatement following a family and medical leave. The School will provide written notice to any "key" employee who is not eligible for reinstatement.

If you have any questions concerning, or would like to submit a request for a family and medical leave of absence, please contact the School Director.

## PREGNANCY DISABILITY LEAVE

The School provides pregnancy disability leaves of absence without pay to eligible employees who are temporarily unable to work due to a disability related to pregnancy, childbirth, or related medical conditions. Employees should make requests for pregnancy disability leave to their supervisor at least 30 days in advance of foreseeable events and as soon as possible for unforeseeable events. A health care provider's statement must be submitted, verifying the need for such leave and its beginning and expected ending dates. Any changes in this information should be promptly reported to the School. Employees returning from pregnancy disability leave must submit a health care provider's verification of their fitness to return to work.

The School will make a good faith effort to provide reasonable accommodations and/or transfer requests when such a request is medically advisable based on the certification of a health care provider. When an employee's health care provider finds it is medically advisable for an employee to take intermittent leave or leave on a reduced work schedule and such leave is foreseeable based on planned medical treatment because of pregnancy, the School may require the employee to transfer temporarily to an available alternative position. This alternative position will have an equivalent rate of pay and benefits and must better accommodate recurring periods of leave than the employee's regular job.

Eligible employees are normally granted unpaid leave for the period of disability, up to a maximum of four months (or 17 1/3 weeks or 693 hours) per pregnancy. Employees will be required to use any accrued sick time during any unpaid portion of pregnancy disability leave (e.g. for example, any period in which you are not receiving a wage supplement through the EDD). Employees may also elect to use any accrued leave time during any unpaid portion of pregnancy disability leave. If an employee is receiving benefit payments pursuant to a disability insurance plan (such as California's State Disability Insurance plan or Paid Family Leave program), the employee and the School may mutually agree to supplement such benefit payments with available leave time and/or sick leave.

Benefit accrual, such as leave time, paid sick leave, and holiday benefits, will be suspended during the approved pregnancy disability leave period and will resume upon return to active employment. Group health benefits will be maintained during the approved pregnancy disability leave as if you were continuously employed. However, you must continue to pay your share of applicable premiums (for yourself and any dependents) during the leave.

So that an employee's return to work can be properly scheduled, an employee on pregnancy disability leave is requested to provide the School with at least one week's advance notice of the date they intend to return to work.

When an approved pregnancy disability leave ends, the employee will be reinstated to the same position, unless the job ceases to exist because of legitimate business reasons. An employee has no greater right to reinstatement to the same position or to other benefits and conditions of employment than if they have been continuously employed in this position during the pregnancy disability leave or transfer. If the same position is not available, the employee will be offered a comparable position in terms of such issues as pay, location, job content, and promotional opportunities, if one exists. An employee has no greater right to reinstatement to a comparable position or to other benefits or conditions of employment than if the employee would not have otherwise been employed if leave had not been taken.

If you have any questions regarding pregnancy disability leave, please contact the School Director.

## MILITARY SPOUSE LEAVE

An eligible employee-spouse of a qualified service member is entitled to take ten (10) days of unpaid leave during a period when the spouse or registered domestic partner is on leave from military deployment.

An eligible employee must work an average of 20 hours per week; have a spouse or registered domestic partner who is a member of the Armed Forces, National Guard or Reserves; must provide notice of their intention to take the leave within two (2) business days of receiving official notice that the service member will be on leave from deployment; and submit written documentation certifying that the service member will be on leave during the time the leave is required.

The employee may use accrued leave time/sick leave during this unpaid time off.

## WORKERS' COMPENSATION LEAVE

Employees that are temporarily disabled due to a work-related illness or injury will be placed on workers' compensation leave. The duration of your leave will depend upon the rate of your recovery and the medical provider's recommendation. Workers' compensation leave will run concurrently with any other applicable medical leave of absence (i.e., FMLA/CFRA if applicable). The School Director will reach out to employees that have requested a workers' compensation leave regarding employer provided health insurance benefits. If you have any questions concerning this leave and/or any benefit related questions, please contact the School Director.

## BEREAVEMENT LEAVE

Sherwood Montessori provides time off to eligible employees in the event of the death of a "family member". To be eligible for Bereavement Leave, the employee must be employed for at least thirty (30) days prior to starting Bereavement Leave. If an employee is eligible for Bereavement Leave and the employee experiences the death of a family member, the employee may take up to five (5) days of Bereavement Leave.

For purposes of this policy, a family member is defined as a: spouse, domestic partner, child, parent, parent-in-law, sibling, grandparent and grandchild.

The days of Bereavement Leave do not need to be taken consecutively; however, the employee must use Bereavement Leave within three (3) months of the death of the family member, at which time any remaining unused Bereavement Leave will expire.

Within the first thirty (30) days of the first day of Bereavement Leave, an employee must provide the School Director with documentation to support the need for Bereavement Leave which may include a death certificate; a published obituary, verification of death, burial or memorial service from a mortuary, funeral home, burial society, crematorium, religious institution or governmental agency.

Bereavement Leave is unpaid; however, an employee may elect to use any accrued leave time.

## JURY DUTY LEAVE

All employees who receive a notice of jury/witness duty must notify their supervisor as soon as possible so that arrangements may be made to cover the absence. In addition, employees must provide a copy of the official jury/witness duty notice to their supervisor. Employees must report for work whenever the court schedule permits. Either the School or the employee may request an excuse from jury/witness duty if, in the School's judgment, the employee's absence would create serious operational difficulties.

Non-exempt employees who are called for jury/witness duty will be provided time off without pay. Exempt employees will receive their regular salary unless they do not work any hours during

the course of a workweek. Employees may elect to use any accrued leave time during jury/witness duty leave.

In the event that the employee must serve as a witness within the course and scope of their employment with the School, the School will provide time off with pay.

## TIME OFF TO VOTE

The School will allow any employee who is a registered voter and does not have enough time outside of working hours to vote in a statewide election up to two (2) hours of work time to vote. If employees are unable to vote in an election during their non-working hours, then the School will grant up to two hours of paid time off to vote. The request must be made at least two (2) working days in advance. The time must be scheduled at the beginning or end of the work shift, whichever provides the least disruption to the normal work schedule unless the School and the employee agree otherwise.

An employee may also serve as an election official on Election Day without being disciplined, however the School will not pay the employee for this time off. Accrued unused leave time may be paid to the employee for this time off.

Employees must submit a voter's receipt on the first working day following the election to qualify for paid time off. Nothing in this policy requires the employee to bring their mail (absentee) ballot to work, including mailing such absentee ballots from work.

## SCHOOL ACTIVITIES LEAVE

The School encourages employees to participate in the school activities of their child(ren). If you are the parent or guardian of a child who is in school up to grade 12, or who attends a licensed day care facility, you may take up to 40 hours of unpaid leave per year to participate in the activities of the school or day care facility, to find, enroll or reenroll your child in a school or with a licensed child care provider and/or to address a child care provider or school emergency.

The leave is subject to all of the following conditions:

- The time off for school activity participation cannot exceed eight (8) hours in any calendar month, or a total of forty (40) hours each year;
- Unless it is an emergency, employees planning to take time off for school visitations must provide as much advance notice as possible to their supervisor;
- If the School employs both parents, the first employee to request such leave will receive the time off. The other parent will receive the time off only if the leave is approved by their supervisor;
- Employees must use existing leave time in order to receive compensation for this time off;

- Employees who do not have paid time off available will take the time off without pay.
- Documentation of participation may be requested and will be sufficient if it is provided in writing by the school or the licensed child care/day care facility.

## SCHOOL APPEARANCE/SUSPENSION LEAVE

If the parent or guardian of a child facing suspension from school is summoned to the school to discuss the matter, the employee should alert their supervisor as soon as possible before leaving work. To be eligible for time off to attend a child's school, the employee must be the parent of a child in kindergarten or in grades 1-12 and must present the school's letter, which requests the employee's appearance at the school, to their supervisor at least two days before the requested time off.

This leave is unpaid but the employee may choose to use accrued leave time. You will not be discharged or discriminated against because of an absence protected by this law.

## CRIME VICTIM LEAVE

Employees are allowed to be absent from work to attend judicial proceedings related to a violent felony, serious felony (as defined by the California Penal Code) or felonies related to theft or embezzlement if:

- The employee is a victim of such a crime;
- An immediate family member (i.e., spouse, registered domestic partner, child, step-child, sibling, step-sibling, parent, step-parent, or the child or a registered domestic partner) of an employee is a victim of such a crime;

An employee must give reasonable advance notice to the school by providing documentation of the proceeding. Documentation may be from any of the following:

- Notice from the court or government agency setting the hearing;
- The district attorney or prosecuting attorney's office; or
- The victim/witness assistance office advocating on the victim's behalf.

This leave is unpaid but the employee may choose to use accrued leave time or sick leave. You will not be discharged or discriminated against because of an absence protected by this law.

## DOMESTIC VIOLENCE LEAVE/SEXUAL ASSAULT/STALKING LEAVE

If you are a victim of crime or abuse, including domestic violence, sexual assault, stalking, or a crime that caused physical injury or, in certain cases, mental injury, or that caused the death of an

immediate family member, you may take time off to obtain or attempt to obtain judicial relief, such as obtaining restraining orders, to help insure your health, safety or welfare or that of your child(ren). Employees may use available leave time (if applicable) or accrued PSL. Otherwise, the time off is unpaid. All employees can take time off from work to get medical attention or services from a domestic violence shelter, program, or rape crisis center, or receive psychological counseling or safety planning related to domestic violence, sexual assault, or stalking. Domestic violence, sexual assault and stalking victim's leave for medical treatment does not exceed or add to the unpaid leave time that FMLA/CFRA allows.

You must give the School reasonable notice unless advance notice is not feasible, and provide certification that you are seeking such assistance.

Certification may be sufficiently provided by any of the following:

- A police report indicating that you were a victim crime or abuse;
- A court order protecting or separating you from the perpetrator of an act of crime or abuse, or other evidence from the court or prosecuting attorney that you appeared in court; or,
- Documentation from a medical professional, domestic violence advocate or advocate for victims of sexual assault, health care provider, or counselor that you are undergoing treatment for physical or mental injuries or abuse due to the crime or abuse.
- Any other form of documentation that reasonably verifies the crime or abuse occurred which can include a written statement signed by you or an individual acting on your behalf certifying that the absence(s) is for the purpose authorized under this leave.

Employees have the right to ask the School for help or changes in their workplace to make sure they are safe at work. The School will work with its employees to see what changes can be made. Changes in the workplace may include putting in locks, changing shifts or phone numbers, transferring or reassigning the employee, or help with keeping a record of what happened to the employee. The School may ask the affected employee for a signed statement certifying that this request is for a proper purpose and may also request proof showing the need for an accommodation.

The School will, to the extent allowed by law, maintain the confidentiality of an employee requesting leave under this provision. The School will not discharge, discriminate or retaliate against an employee who exercises their rights under this law.

Sherwood Montessori is committed to ensuring employees are not treated differently or retaliated against because of any of the following:

- The employee is a victim of domestic violence, sexual assault, or stalking.

- The employee asked for time off to get help.

- The employee asked Sherwood Montessori for help or changes in the workplace to ensure safety at work.

If any employee believes that they have experienced retaliation or discrimination as a result of conduct protected by this policy, the employee may file a complaint with their supervisor and/or the Labor Commissioner's Office.

For more information, contact the Labor Commissioner's Office by phone at 213-897-6595 or visit a local office by finding the nearest one on the website: www.dir.ca.gov/dlse/DistrictOffices.htm. The Labor Commissioner's Office provides an interpreter at no cost to the employee, if needed.

## MILITARY LEAVE

California's military leave laws and the Uniformed Services Employment and Reemployment Rights Act ("USERRA") ensure that employees are not adversely affected in their employment after taking leave for military service. Employees who serve in the military and are entitled to a military leave of absence without pay from the School under applicable laws should notify the School Director regarding the need for military leave.

Please see the School Director for more information regarding job reinstatement rights upon completion of military service.

## ADULT LITERACY LEAVE

Pursuant to California law, the School will reasonably accommodate any eligible employee who seeks to enroll in an adult literacy education program, provided that the accommodation does not impose an undue hardship on the School. The School does not provide paid time off for participation in an adult literacy education. However, you may utilize accrued leave time if you want compensation for this time off. If you do not have accrued leave time available, you will be permitted to take the time off without pay.

## ORGAN DONOR / BONE MARROW DONOR LEAVE

The School will provide up to five business days of paid leave within a one-year period to an employee who donates bone marrow to another person. In addition, the School will provide up to 30 business days of paid leave within a one-year period and up to another 30 business days of unpaid leave within a one-year period to an employee who donates an organ to another person. The one-year period is measured from the date the employee's leave begins and shall consist of 12 consecutive months. You must give as much notice as is practicable and must provide certification of the medical necessity of the procedure. You will be required to use up to ten (10) days of any accrued paid leave (sick and/or leave time) for organ donation and up to five (5) days accrued paid leave (sick and/or leave time) for bone marrow donation. This leave does not run concurrently with FMLA/CFRA. You must have been employed for at least a 90-day period immediately preceding the beginning of the leave, if otherwise eligible.

You may take this leave incrementally, as medically necessary, or all at one time. All health benefits shall be maintained during this leave to the extent they exist at the time of the leave. This

leave shall not be considered a break in service and the employee shall continue to accrue paid time off and other benefits as if they had continued working. The Employee shall be required to pay any portion of their benefits they are currently paying.

An employee shall not have any greater rights during this leave than if they have been actively working during this time but will be reinstated to their same or equivalent job prior to the leave. No employee shall be discriminated or retaliated against for taking an organ donation or bone marrow leave.

## DRUG & ALCOHOL REHABILITATION LEAVE

Sherwood Montessori will reasonably accommodate any eligible employee who volunteers to enter and participate in an alcohol or drug rehabilitation program, if the reasonable accommodation does not impose an undue hardship on the School. Reasonable accommodation includes time off without pay and adjusting work hours. You may use accrued and unused leave time or paid sick leave. All reasonable measures to safeguard your privacy will be maintained.

This policy in no way restricts the Sherwood Montessori's right to discipline an employee, up to and including termination of employment, for violation of Sherwood Montessori's Drug and Alcohol Policy.

## VOLUNTEER CIVIL SERVICE LEAVE

In California, no employee shall receive discipline for taking time off to perform emergency duty as a volunteer firefighter, reserve peace officer, or emergency rescue personnel. If you are participating in this kind of emergency duty, please alert your supervisor so that they may be aware of the fact that you may have to take unpaid time off for emergency duty. In the event that you need to take time off for emergency duty, please alert your supervisor before doing so whenever possible.

Emergency Duty is unpaid. You may choose to use your accrued leave time if you wish to receive compensation for this time off, but you are not required to do so.

If you feel you have been treated unfairly as a result of taking or requesting Emergency Duty, you should contact your supervisor or any other manager, as appropriate.

## CIVIL AIR PATROL LEAVE

Sherwood Montessori provides eligible employees who are volunteer members of the California Wing of the Civil Air Patrol and are called to emergency operational missions up to 10 days of unpaid leave per calendar year. Leave for a single emergency operational mission will generally be limited to three days unless an extension is granted by appropriate government entities and approved by the School.

To be eligible, employees must have been employed with Sherwood Montessori for 90 days immediately preceding the commencement of leave. Additionally, the School may require certification from the proper Civil Air Patrol authority to verify the eligibility of the employee for the leave requested or taken.

Employees are required to give the School as much notice as possible of the intended dates upon which the leave would begin and end. The School will restore the employee to the position they held when the leave began or to a position with equivalent seniority status, employee benefits, pay, and other terms and conditions of employment, unless the employee is not restored because of conditions unrelated to the exercise of the leave rights by the employee. The time off is unpaid. However, an employee may utilize accrued leave time.

# SECTION 9 – BENEFITS

## SICK LEAVE

The School enacted this policy in accordance with the California Healthy Workplaces, Healthy Families Act to provide paid sick leave ("PSL") to eligible employees.

### 1 Eligible Employees

All employees (including part-time and temporary) who work for the School 30 or more days within a year in California are eligible to accrue PSL beginning on the first day of employment under the accrual rate and cap set forth in this policy.

### 2 Permitted Use

Eligible employees may use their accrued PSL to take paid time off for the diagnosis, care, or treatment of an existing health condition of (or preventive care for) the employee or the employee's family member. For purposes of this policy, "family member" means a child, parent, spouse, registered domestic partner, grandparent, grandchild, sibling of the employee or "designated person". "Child" means a biological child, a foster child, an adopted child, a step-child, a child of a registered domestic partner, a legal ward, or a child of a person standing in loco parentis, regardless of the age or dependency status of the child. "Parent" means a biological, foster, or adoptive parent; a step-parent; or a legal guardian of the employee or the employee's spouse or registered domestic partner. A parent may also be someone who accepted the duties and responsibilities of raising the employee when the employee was a minor child, even if they are not the employee's legal parent. "Spouse" means a legal spouse, as defined by California law. A "designated person" is any individual the employee identifies at the time the employee requests PSL. An employee is limited to one designated person per 12-month period for purposes of PSL.

Employees may also use their PSL to take time off from work for reasons related to domestic violence, stalking, or sexual assault, including being a victim of crime or abuse.

### 3 Accrual Rate, Maximum, and Carryover

Eligible employees will accrue one hour of PSL for every 30 hours worked beginning on their first day of employment. Accrual for non-exempt employees will be calculated based on actual hours worked. Accrual of PSL for eligible exempt employees will be calculated based on a 40-hour workweek or the employee's normal workweek if the employee normally works less than 40 hours. PSL accrues on an as-worked basis and does not accrue during any non-working time or unpaid leave of absence.

There is a cap on PSL accrual. Employees may accrue up to 24 hours of PSL. Once the employee's PSL reaches the maximum, further accrual of PSL is suspended until the employee has reduced the PSL balance below this limit. In such a case, no PSL will be earned for the period in which the employee's PSL was at the maximum. Accrued but unused PSL will carry over from year to year, subject to this maximum accrual.

4 Limits on Use

Eligible employees may use accrued PSL beginning on the 90th day of employment. Each school year, employees may only use a maximum of 24 hours of their accrued PSL.

PSL may be taken in minimum increments of one hour. If an exempt employee absents themselves from work for part or all of a workday for a reason covered by this policy, they will be required to use accrued PSL to make up for the absence.

5 Notification

The employee must provide reasonable advance notification, orally or in writing, of the need to use PSL, if foreseeable. If the need to use PSL is not foreseeable, the employee must provide notice as soon as practicable.

6 Termination

Employees will not receive pay in lieu of accrued but unused PSL. Accrued but unused PSL will not be paid out upon termination.

7 No Discrimination or Retaliation

The School prohibits discrimination or retaliation against employees for using their PSL.

## LEAVE POLICY

Emergency Leave

Emergency leave is available to full time 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 School Director of an anticipated absence as soon as possible, and such leave (other than for unexpected circumstances) must be preapproved by the School Director. The School Director may require an employee to verify the claimed reason for any absence.

Personal Leave

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

Long Term Leave

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

Jury Duty

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

Professional Development Leave

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

## INSURANCE BENEFITS

Full-time employees are entitled to insurance benefits offered by Sherwood Montessori. These insurance benefits will include medical, dental, and vision. The School will set a defined contribution towards the employee’s insurance premiums that are sponsored by Sherwood Montessori. This amount will be determined on an annual basis. The employee’s portion of the monthly premiums will be deducted from the employee’s paycheck on a pre-tax basis.

If medical insurance premium rates increase, employees may be required to contribute to the cost of the increase to retain coverage. Unless otherwise mandated by law, employees on a leave of absence may be responsible for selecting continuing health coverage and paying the premium for such coverage through COBRA. If you have any benefit related questions while on a leave of absence, please contact the Administrative Assistant.

## COBRA BENEFITS

The Federal Consolidated Budget Reconciliation Act (COBRA) gives employees and their qualified beneficiaries the opportunity to continue health insurance coverage under Sherwood Montessori's health plan when a "qualifying event" would normally result in the loss of eligibility.

Some common qualifying events are resignation, termination of employment, or death of an employee, a reduction in an employee's hours or leave of absence, divorce or legal separation and a dependent child no longer meeting eligibility requirements.

Under COBRA, the employee or beneficiary pays the full cost of coverage at Sherwood Montessori group rates plus an administration fee. Sherwood Montessori or our carrier provides each eligible employee with a written notice describing rights granted under COBRA when the employee becomes eligible for coverage under Sherwood Montessori's health insurance plan. The notice contains important information about the employee's rights and obligations.

## SOCIAL SECURITY/MEDICARE

Social Security is an important part of every employee's retirement benefit. The School pays a matching contribution to each employee's Social Security taxes.

## STATE DISABILITY INSURANCE (WAGE SUPPLEMENT)

All employees are enrolled in California State Disability Insurance (SDI), which is a partial wage replacement insurance plan for California workers. Employees may be eligible for SDI when they are ill or have non-work related injuries, or may be eligible for work related injuries if they are receiving workers' compensation at a weekly rate less than the SDI rate. Specific rules and regulations relating to SDI eligibility are available from the Administrative Assistant.

## PAID FAMILY LEAVE (WAGE SUPPLEMENT)

Under California law, eligible employees may participate in the Paid Family Leave ("PFL") program, which is part of the state's unemployment compensation disability insurance program. The PFL program provides up to eight weeks of partial wage replacement benefits to employees who take time off to care for a seriously ill or injured child, spouse, parent, registered domestic partner, siblings, grandparents, grandchildren, or parents-in-law or to bond with a new child (birth, foster care, adoption). The PFL program does not provide job protection or reinstatement rights. It is a wage supplement provided concurrently while an employee takes an eligible leave of absence under Sherwood Montessori policy and applicable law.

Sherwood Montessori will require you to take up to two weeks of accrued but unused leave days prior to your receipt of benefits under the PFL program.

The program will be administered in a manner consistent with California law. For more information regarding this program, you may contact the California Employment Development Department.

## WORKER'S COMPENSATION INSURANCE

Eligible employees are entitled to workers' compensation insurance benefits when suffering from an occupational illness or injury. This benefit is provided at no cost to the employee.

If an employee should become injured or in any way disabled on the job, they must report the injury immediately to their supervisor. It is a felony to file a fraudulent or false workers' compensation claim.

# SECTION 10 – EMPLOYEE COMMUNICATIONS

## COMMUNICATIONS POLICY

Every employee is responsible for using Sherwood Montessori's computer system, including, without limitation, its computers, laptops, iPads, tablets, cellular phones, electronic mail (Email) system, telephone, video conferencing, voicemail, facsimile systems and the Internet ("Communications Systems"), properly and in accordance with this policy. Any questions about this policy should be addressed to the School Director.

The Communication Systems are the property of Sherwood Montessori and have been provided for use in conducting Sherwood Montessori business. All communications and information transmitted by, received from, created, or stored in its Communication Systems are Sherwood Montessori records and property of Sherwood Montessori. The Communication Systems are to be used for school purposes only. Employees may, however, use Sherwood Montessori technology resources for the following incidental personal uses so long as such use does not interfere with the employee's duties, is not done for pecuniary gain, does not conflict with Sherwood Montessori business, and does not violate any Sherwood Montessori policies:

- To send and receive necessary and occasional personal communications;
- To use the telephone system for brief and necessary personal calls; and
- To access the Internet for brief personal searches and inquiries during meal periods or other breaks, or outside of work hours, provided that employees adhere to all other usage policies.

### 1 No Expectation of Privacy

Sherwood Montessori has the right, but not the duty, to monitor any and all of the aspects of its Communication Systems, including, without limitation, reviewing documents created and stored on its Communication Systems, deleting any matter stored in its system (including, without limitation, its Email and word processing systems), monitoring sites visited by employees on the Internet, monitoring chat and news groups, reviewing material downloaded or uploaded by users to the Internet, and reviewing Email, voicemails and instant messages sent and received by users. Further, Sherwood Montessori may exercise its right to monitor its Communications Systems for any reason and without the permission of any employee. Employee use of Sherwood Montessori's Communication Systems constitutes consent to all the terms and conditions of this policy.

Even if employees use a password to access the Communication Systems (or any aspect thereof), the confidentiality of any message stored in, created, received, or sent from Sherwood Montessori's Communication Systems is not assured. Use of passwords or other security measures does not in any way diminish Sherwood Montessori's right to monitor and access materials on its Communication Systems, or create any privacy rights of employees in the messages and files on the system. Any password used by employees must be revealed upon request to Sherwood Montessori for any reason that Sherwood Montessori, in its discretion, deems appropriate. Further, employees should be aware that deletion of any Email messages, voicemails or files would not truly eliminate the messages from the system. All Email messages,

voicemails and other files may be stored on a central back-up system in the normal course of data management.

Employees have no expectation of privacy in anything they view, create, store, send or receive on the Communication Systems.

Notwithstanding the foregoing, even though Sherwood Montessori has the right to retrieve, read and delete any information viewed, created, sent, received or stored on its Communication Systems, Email messages should still be treated as confidential by other employees and accessed only by the intended recipient. Employees are not authorized to retrieve or read any Email messages that are not sent to them or by them. Any exception to this policy must receive the prior approval of the School Director.

2 Professional Use of Communication Systems Required

Employees are reminded to be courteous to other users of the system and always to conduct themselves in a professional manner. Emails and other text communications, in particular, are sometimes misdirected or forwarded and may be viewed by persons other than the intended recipient. Users should write Email communications with no less care, judgment and responsibility than they would use for letters or internal memoranda written on Sherwood Montessori letterhead.

3 Offensive and Inappropriate Material

Sherwood Montessori's policy against discrimination and harassment, sexual or otherwise, applies fully to Sherwood Montessori's Communication Systems, and any violation of that policy is grounds for discipline up to and including discharge. Therefore, no Email messages should be created, sent, or received if they contain intimidating, hostile, or offensive material concerning race, color, religion, sex, age, national origin, disability or any other characteristic protected by law. Further, material that is fraudulent, harassing, abusive, embarrassing, sexually explicit, profane, obscene, intimidating, defamatory, unlawful, inappropriate, or offensive (including offensive material concerning sex, race, color, national origin, religion, age, disability, or any other characteristic protected by law) may not be downloaded from the Internet or displayed or stored in Sherwood Montessori's computers. Employees encountering or receiving this kind of material should immediately report the incident to the School Director.

Sherwood Montessori uses software to identify inappropriate or sexually explicit Internet sites. Such sites may be blocked from access by Sherwood Montessori networks. Notwithstanding the foregoing, Sherwood Montessori is not responsible for material viewed or downloaded by users from the Internet. The Internet is a worldwide network of computers that contains millions of pages of information. Users are cautioned that many of these pages include offensive, sexually explicit, and inappropriate material. Even innocuous search requests may lead to sites with highly offensive content. In addition, having an email address on the Internet may lead to receipt of unsolicited email containing offensive content. Users accessing the Internet do so at their own risk. Employees who encounter inappropriate or sexually explicit material while browsing on the Internet should immediately disconnect from the site, regardless of whether the site was subject to Sherwood Montessori's blocking software.

4 Solicitations

Sherwood Montessori's Communication Systems may not be used to solicit for political causes, commercial enterprises, outside organizations, or other non-job-related solicitations. Approval from the School Director is required before anyone can post any information on commercial on-line systems or the Internet.

5 Licenses and Fees

Employees may not agree to a license or download any material over the Internet for which a registration fee is charged without first obtaining the express written permission of the School Director.

6 Games and Entertainment Software

Employees may not use a Sherwood Montessori Internet connection to download games or other entertainment software, or to play games over the Internet.

7 Confidential Information

Employees may not transmit information over the Internet or through email that is confidential or proprietary. Employees are referred to Sherwood Montessori's "Confidential Information" policy, contained herein, for a general description of what Sherwood Montessori deems confidential or proprietary. When in doubt, employees must consult their immediate supervisor and obtain approval before transmitting any information that may be considered confidential or proprietary.

8 Copyrights and Trademarks

Sherwood Montessori's Communication Systems may not be used to send (upload) or receive (download) copyrighted materials, trade secrets, proprietary financial information, or similar materials without prior authorization from the School Director. Employees, if uncertain about whether certain information is copyrighted, proprietary, or otherwise inappropriate for transfer, should resolve all doubts in favor of not transferring the information and consult a supervisor. Any Sherwood Montessori-approved material that is posted or sent via its computer system should contain all proper copyright and trademark notices.

9 Maintenance and Security of the System

Employees must not deliberately perform acts that waste resources or unfairly monopolize resources to the exclusion of others. These acts include, but are not limited to, sending mass mailings or chain letters, spending excessive amounts of time on the Internet, playing games, streaming video or audio files, engaging in online chat groups, printing excessive copies of documents, or otherwise creating unnecessary network traffic. Because audio, video and picture files require significant storage space, files of this or any other sort may not be downloaded unless they are business-related.

To ensure security and to avoid the spread of viruses, employees accessing the Internet through a computer attached to Sherwood Montessori's network must do so through an approved Internet

firewall. Accessing the Internet directly by modem is strictly prohibited unless the computer you are using is not connected to Sherwood Montessori's network.

Files obtained from sources outside Sherwood Montessori including disks brought from home; including files downloaded from the Internet, news groups, bulletin boards, or other online services; files attached to email; and files provided by students, parents or vendors, may contain dangerous computer viruses that may damage Sherwood Montessori's computer network. Employees should never download files from the Internet, accept email attachments from outsiders, or use disks from non- Sherwood Montessori sources, without first scanning the material with Sherwood Montessori-approved virus checking software. If you suspect that a virus has been introduced into Sherwood Montessori network, notify technology personnel immediately.

10 Violations of this Policy

Violations of this policy will be taken seriously and may result in disciplinary action, including possible termination, and civil and criminal liability.

11 Amendment and Modification of this Policy

Sherwood Montessori reserves the right to modify this policy at any time, with or without notice. Sherwood Montessori may require employees to acknowledge and comply with a separate Acceptable Use Policy for Internet and Network Resources.

## SOCIAL MEDIA POLICY

Sherwood Montessori has adopted the following policy with regard to employees' behavior on social networking sites including, but not limited to, Facebook, Twitter, LinkedIn, Pinterest, Instagram, SnapChat and YouTube. If you wish to use networking protocols or set up a social media site as a part of the educational process, please work with your administrators and technology staff to identify and use a restricted, school-endorsed networking platform. Such sites will be the property of the School who will have unrestricted access to, and control of, such sites.

This policy is intended to supplement, not replace, the School's other policies, rules, and standards of conduct. For example, School policies on confidentiality, use of School equipment, professionalism, employee references and background checks, workplace violence, unlawful harassment, and other rules of conduct are not affected by this policy.

You are required to comply with the following rules and guidelines when participating in social media activities that are governed by this policy:

- Comply with the law at all times. Do not post any information or engage in any social media activity that may violate applicable local, state, or federal laws or regulations.

- Do not engage in any discriminatory, harassing, or retaliatory behavior in violation of School policy.

- Respect copyright, fair use, and financial disclosure rules and regulations. Identify all copyrighted or borrowed material with proper citations and/or links.

- Maintain the confidentiality of the School's trade secrets and private or confidential information. Trade secrets may include information regarding the development of systems, processes, products, know-how, and technology. Do not post internal reports, policies, procedures, or other internal business-related confidential communications. This prohibition applies both during and after your employment with the School.

- Do not post confidential information (as defined in this Handbook) about the School, its employees, or its students. Remember that most student information is protected by the Family Educational Rights and Privacy Act, including any and all information that might identify the student. Publicizing student work and accomplishments is permitted only if appropriate consents are obtained.

- While limited and incidental social media activities at work may be tolerated, such social media activities may not interfere with your job duties or responsibilities. Do not use your School-authorized e-mail address to register on social media websites, blogs, or other online tools utilized for personal use.

- Be knowledgeable about and comply with the School's background check procedures.

- We encourage you to be fair and courteous to fellow employees, students, parents, vendors, customers, suppliers, or other people who work on behalf of the School. We also encourage you to avoid posting statements, photographs, video, or audio that could be reasonably viewed as malicious, obscene, threatening, or intimidating, that disparage employees, students, parents, vendors, customers, suppliers, or other people who work on behalf of the School, or that might constitute harassment or bullying.

- Make sure you always try to be honest and accurate when posting information or news, and if you make a mistake, correct it quickly. Please do not post any information or rumors that you know to be false about the School, fellow employees, students, parents, vendors, customers, suppliers, people working on behalf of the School, or competitors.

- Never represent yourself as a spokesperson for the School unless authorized to do so. If you publish social media content that may be related to your work or subjects associated with the School, make it clear that you are not speaking on behalf of the School and that your views do not represent those of the School, fellow employees, students, parents, vendors, customers, suppliers, or other people working on behalf of the School. It is best to use a disclaimer such as "The postings on this site are my own and do not necessarily reflect the views of the School."

- Never be false or misleading with respect to your professional credentials.

- Do not publicly post any photos, videos, or other media in the workplace or on the School's premises or at School functions without permission of the School. It is your responsibility to ensure that your posts do not contain any prohibited information, or Confidential Information, including, but not limited to, photos, videos, or other media

referencing or relating to student information, even if the student(s) is/are not specifically identified by name but could be easily determined or may be perceived as identifying any student or group of students. Violations may result in disciplinary action, up to and including termination.

Employees are not to initiate "friendships" with students or parents. Employees shall not accept students as friends on any personal social networking sites and are to decline any student-initiated friend requests. Employees must delete any students already on their "friends" list immediately. Employees should also be aware that participation in social media, even in a private setting, may not remain private and posts may become public knowledge and/or reported to the School.

Employees should weigh whether a particular posting puts their effectiveness as a School employee at risk. Sherwood Montessori encourages employees to post only what they want the world to see. Imagine that students, their parents, or administrators will visit your site as most information is available to the general public even after it is removed from the site. Employees may not discuss students nor post images that include students.

This policy should not be construed, and will not be applied, in a manner that violates employee rights under the National Labor Relations Act.

Employees may not comment on a student's blog or a student's other social networking commentaries.

Employees may not use trade names, or logos belonging to the School without express written permission of the School Director..

In the event you have any questions about whether a particular social media activity may involve or implicate the School, or may violate this policy, please contact the School Director.

Social media is in a state of constant evolution, and the School recognizes that there will likely be events or issues that are not addressed in these guidelines. Thus, each School employee is responsible for using good judgment and seeking guidance, clarification, or authorization before engaging in social media activities that may implicate this policy.

Failure to comply with Sherwood Montessori's social media policy will result in disciplinary action, up to, and including, immediate termination.

## EQUIPMENT POLICY

Sherwood Montessori attempts to provide all staff members with the equipment and supplies needed to do their job. Providing equipment is a great expense to the School. It is expected that everyone will protect and care for all equipment and supplies issued to them. Staff members are responsible for the cost of lost, stolen, or broken items issued to them including: keys, textbooks, teacher guides, laptops, and any other equipment that may be assigned to them or their classroom if the loss is due to willful misconduct.

## LAPTOP COMPUTERS

Each full time exempt employee receives a laptop computer for use in carrying out day-to-day functions such as lesson planning, email, enhancing classroom instruction, and using school-provided software for administrative duties (i.e. tracking attendance, logging grades, posting comments, etc.). Employee-issued laptops are property of Sherwood Montessori. Employees are required to treat their laptops with great care. Laptops may never be left unattended or in unlocked classrooms. Upon termination of employment, employees understand and agree that they must promptly return their school-issued laptop to the School. Employees are responsible for reimbursing the School for the cost of lost or damaged laptops when the loss or damage is due to the willful misconduct of the employee.

Employees acknowledge and understand that Sherwood Montessori is the owner of the laptop and of all information contained on the laptop. Employees are discouraged from keeping personal information on their school-issued laptops or using the laptops for personal use. There should be no expectation of privacy with regard to a school-issued laptop and employees must return their laptop upon request by the School.

## PERSONAL PHONE AND PERSONAL CELL PHONE USE

Personal phone calls should not be made or received during working hours. Any such calls must be made during employee breaks. Friends and relatives should be discouraged from calling during business hours unless there is an emergency. All emergency calls should be directed to the main office. When the call is received, the employee will be contacted.

In addition, the use of personal cell phones for placing or receiving calls, sending or receiving text messages, checking voicemail, or any other form of communication supported by the School's cell phone provider during working hours is strictly prohibited. Cell phones should be placed out of sight and completely silenced to avoid disruption to the learning environment. In the event of a field trip or other class outing where personal cell phones may be used for safety purposes, communication should be limited to school staff only. The School will not be responsible for lost or stolen cell phones or other personal property.

Notwithstanding the foregoing, employees may, in the event of an "emergency condition," access their mobile device or other communications device for seeking emergency assistance, assessing the safety of the situation, or communicating with a person to verify their safety. For purposes of this policy, an "emergency condition" is defined as:

- Conditions of disaster or extreme peril to the safety of persons or property at the workplace or worksite caused by natural forces or a criminal act; or

- An order to evacuate a workplace, a worksite a worker's home, or the school of a worker's child due to natural disaster or a criminal act.

## NEPOTISM POLICY

Sherwood Montessori permits the employment of qualified relatives of employees, of the employee's household or immediate family as long as such employment does not, in the opinion of Sherwood Montessori, create actual conflicts of interest. For purposes of this policy, "qualified relative" is defined as a spouse, registered domestic partner, child, parent, sibling, grandparent, grandchild, aunt, uncle, niece, nephew, first cousin, corresponding in-law, "step" relation, adoptive relative, guardian, ward, or any member of the employee's household. “Qualified relative” also includes persons engaged in amorous relationships, meaning a relation in which persons voluntarily have a physical relationship or are engaged in a romantic courtship (e.g. dating or engaged) that may or may not have been consummated. Sherwood Montessori will use sound judgment in the placement of related employees in accordance with the following guidelines:

A qualified relative is permitted to work in the same department, provided no direct reporting or supervisor-to-subordinate relationship exists. That is, no employee is permitted to work within "the chain of command" when one qualified relative's work responsibilities, salary, hours, career progress, benefits, or other terms and conditions of employment could be influenced by the other relative.

Qualified relatives may have no influence over the wages, hours, benefits, career progress and other terms and conditions of the other related staff members.

Current employees who marry will be permitted to continue working in the same job positions held only if they do not work in direct supervisory relationship with one another or in job positions involving conflicts of interest. If relatives are found to be employed in any of these prohibited job positions, the School will take action to eliminate the conflict, including possibly requiring one or both employees to accept a transfer to another position or to resign. The Board of Directors must approve any exceptions to this policy.

## BUILDING SECURITY/SCHOOL KEYS

All employees who are issued keys to the office and classrooms are responsible for their safekeeping. These employees will sign a Key Disbursement Form upon receiving the key.

You will be assigned all appropriate building keys needed to conduct your daily job responsibilities. You are responsible for all keys. Duplication of any school key is not allowed and strictly prohibited. It is against School policy to loan or distribute your assigned keys to another employee or non-employee of the School. If your school keys are lost, misplaced, destroyed, or stolen, you must report it immediately to the Administrative Assistant..

The last employee, or a designated employee, who leaves the office and /or the school site at the end of the business day assumes the responsibility to ensure that all doors are securely locked, thermostats are set on appropriate evening and/or weekend setting, and all appliances and lights are turned off with exception of the lights normally left on for security purposes. Employees are not allowed on school property before or after hours without prior authorization.

## INTERNAL INVESTIGATIONS & SEARCHES

From time to time Sherwood Montessori may conduct internal investigations pertaining to security, auditing, or work-related matters. Employees are required to cooperate fully with and assist in these investigations if required to do so.

Whenever necessary, in Sherwood Montessori's discretion, employees' work areas (i.e. desks, file cabinets, lockers, etc.) may be subject to a search without notice. Employees are required to cooperate. Because even a routine search for Sherwood Montessori property might result in the discovery of an employee's personal possessions, all employees are encouraged to refrain from bringing into the workplace any item of personal property that they do not wish to reveal to Sherwood Montessori. Employees have no expectation of privacy in their work areas.

## VIOLENCE IN THE WORKPLACE

Sherwood Montessori has adopted a policy prohibiting workplace violence. Consistent with this policy, acts or threats of physical violence, including intimidation, harassment, bullying, and/or coercion, which involve or affect Sherwood Montessori or which occur on Sherwood Montessori property will not be tolerated. Examples of workplace violence include, but are not limited to, the following:

All threats or acts of violence occurring on Sherwood Montessori premises, regardless of the relationship between Sherwood Montessori and the parties involved.

All threats or acts of violence occurring off Sherwood Montessori premises involving someone who is acting in the capacity of a representative of Sherwood Montessori.

Specific examples of conduct, which may be considered threats or acts of violence, include, but are not limited to, the following:

- Hitting or shoving an individual
- Threatening an individual or their family, friends, associates, or property with harm
- Intentional destruction or threatening to destroy Sherwood Montessori property
- Making harassing or threatening phone calls
- Harassing surveillance or stalking (following or watching someone)
- Unauthorized possession or inappropriate use of firearms or weapons

Sherwood Montessori's prohibition against threats and acts of violence applies to all persons involved in Sherwood Montessori's operation, including but not limited to all personnel, contract, unpaid interns, volunteers and temporary workers and anyone else, including parents on Sherwood Montessori property. Violations of this policy by any individual on Sherwood Montessori property will lead to disciplinary action, up to and including termination and/or legal action as appropriate. All employees are encouraged to report incidents of threats or acts of physical violence of which they are aware to their supervisors or to the School Director.

If an employee becomes aware of an imminent act of violence, a threat of imminent violence, or actual violence, emergency assistance must be sought immediately. In such situations, the employee should contact the law enforcement authorities by dialing 911. Immediately after contacting the law enforcement authorities, the employee must report the incident to School Director.

Employees should immediately inform their supervisor or the School Director about any workplace security hazards. If these individuals are not available, the employee should immediately inform any other supervisor so that appropriate action can be taken.

There will be no retaliation against any employee who brings a complaint in good faith under the Violence in the Workplace Policy or who honestly assists in investigating such a complaint, even if the investigation produces insufficient evidence that there has been a violation, or if the charges cannot be proven. However, disciplinary action may be taken against employees who, in bad faith, make false or frivolous accusations.

In certain circumstances, the School may seek a workplace violence restraining order on behalf of one or more employees in furtherance of its commitment to providing a workplace that is free from acts of violence or threats of violence.

# SECTION 11 – STANDARDS OF CONDUCT

## PERSONAL APPEARANCE/STANDARDS OF DRESS

The Board of Directors believes that teachers and other Sherwood Montessori staff serve as role models. They should therefore maintain professional standards of dress and grooming. Just as overall attitude and instructional competency contribute to a productive learning environment, so do appropriate dress and grooming.

The Board of Directors encourages staff, during school hours, to wear clothing that will add dignity to the educational profession, will present an image consistent with their job responsibilities, and will not interfere with the learning process. Accordingly, all staff shall adhere to the following standards of dress:

- Clothing and jewelry must be safe and appropriate to the educational environment.
- All clothing must be clean and in good repair. Slits or tears in pants or other articles of clothing are not permitted except for modest slits in any apparel that are no higher than five (5) inches above the knee.
- Slacks and shorts are to be worn on the waist with no portion of an undergarment showing. Shorts should be modest in length and should be no higher than five (5) inches above the knee.
- All tops must be appropriate to the work environment, and should be clean, neat, and provide proper coverage.
- For safety purposes, earrings must not dangle more than one (1) inch below the ear.
- Clothing or jewelry that depict and/or promote gangs (as defined in Ed. Code § 35183), drugs, alcohol, tobacco, sex, violence, illegal activities, profanity, or obscenity are not permitted.
- Appropriate shoes must be worn at all times.
- The School Director will be the final arbiter of what constitutes appropriate dress and attire.

## 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.

## 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

### 1 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.

### 2 Acceptable and Unacceptable Behaviors

Some activities may seem innocent from a staff member's perspective but may be perceived as flirtation or sexual insinuation from a student or parental point of view. 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. If a student specifically requests that they not be touched, then that request must be honored. 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.

### 3 Unacceptable Behaviors

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

- Giving gifts to an individual student that are of a personal and intimate nature (including photographs); 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 School Director along with the rationale therefor.

- Kissing of ANY kind
- 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.]
- Full frontal or rear hugs and lengthy embraces
- Sitting students on one's lap (grades 3 and above)
- Touching buttocks, thighs, chest or genital area
- Wrestling with students or other staff member except in the context of a formal wrestling program
- Tickling or piggyback rides
- Any form of sexual contact
- Any type of unnecessary physical contact with a student in a private situation
- Intentionally being alone with a student away from school
- Furnishing alcohol, tobacco products, or drugs or failing to report knowledge of such
- "Dating" or "going out with" a student
- Remarks about physical attributes or physiological development of anyone. This includes comments such as "Looking fine!" or "Check out that [body part]."
- Taking photographs or videos of students for personal use or posting online
- Undressing in front of a student
- Leaving campus alone with a student for lunch
- Sharing a bed, mat, or sleeping bag with a student
- Making, or participating in, sexually inappropriate comments
- Sexual jokes, or jokes/comments with sexual overtones or double-entendres
- Seeking emotional involvement (which can include intimate attachment) with a student beyond the normative care and concern required of an educator.

- Listening to or telling stories that are sexually oriented
- Discussing your personal troubles or intimate issues with a student
- Becoming involved with a student so that a reasonable person may suspect inappropriate behavior
- Giving students a ride to/from school or school activities without the express, advance written permission of the School Director and the student's parent or legal guardian
- Being alone in a room with a student at school with the door closed and/or windows blocked from view
- 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
- Staff mirroring the immature behavior of minors
- 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.

4 <u>Acceptable Behaviors</u>

- Pats on the shoulder or back
- Handshakes
- "High-fives" and hand slapping
- When age appropriate, touching face to check temperature, wipe away a tear, remove hair from face, or other similar types of contact
- Placing TK through second grade students on one's lap for purposes of comforting the child for a short duration only
- Holding hands while walking with small children or children with significant disabilities
- Assisting with toileting of small or disabled children in view of another staff member
- Touch required under an IEP or 504 Plan
- Reasonable restraint of a violent person to protect self, others, or property

- Obtaining formal written pre-approval from the School 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

- 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)

- Keeping the door wide open when alone with a student

- Keeping reasonable and appropriate space between you and the student

- Stopping and correcting students if they cross your own personal boundaries, including touching legs, or buttocks, frontal hugs, kissing, or caressing

- Keeping administration informed when a significant issue develops about a student, such as a change in demeanor or uncharacteristic behavior

- Keeping after-class discussions with a student professional and brief

- Immediately asking for advice from senior staff or administration if you find yourself in a difficult situation related to boundaries

- Involving your 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

- Recognizing the responsibility to stop Unacceptable Behaviors of students and/or co-workers

- Asking another staff member to be present, or within close supervisory distance, when you must be alone with a student after regular school hours

- Prioritizing professional behavior during all moments of student contact

- *Asking yourself if any of your actions, which are contrary to these provisions, are worth sacrificing your job and career.*

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.

5 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 misconduct, they must report the suspicion to the School Director promptly. Reasonable suspicion means something perceived in spite of inconclusive or slight evidence. It is based on facts that would lead a reasonable person to believe the conduct occurred. Prompt reporting is essential to protect students, the suspected staff member, any witnesses, and the school as a whole. Employees must also report to the administration any awareness of, or concern about, student behavior that crosses boundaries, or any situation in which a student appears to be at risk for sexual abuse.

6 Investigating

The School Director will promptly investigate and document the investigation of any allegation of sexual misconduct or inappropriate behavior by a staff member, using such support staff or outside assistance, as they deems necessary and appropriate under the circumstances. Throughout this fact-finding process, the investigating administrator, and all others privy to the investigation, shall protect the privacy interests of any affected student(s) and/or staff member(s) including any potential witnesses, as much as possible. The investigating administrator shall promptly notify the Governing Board in closed session of the existence and status of any investigations. Upon completion of any such investigations, the School Director shall report to the Governing Board any conclusions reached. The investigating administrator shall consult with legal counsel, as appropriate, prior to, during, and after conducting any investigation.

7 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.

## CUSTOMER & PUBLIC RELATIONS

The School's image in front of students, parents (i.e. our "customers") and the general public is critical to our success. All employees are expected to be prompt, polite, courteous and attentive to our customers and the public. It is possible an employee may come into contact with a dissatisfied or hostile individual based on the nature of the employee's work. If this happens, you should immediately notify your supervisor or the School Director. We will absolutely not tolerate conduct toward our customers or the general public that might be interpreted as unlawful discrimination or harassment. If you witness conduct in violation of this policy, you should immediately bring it to the attention of your supervisor or the School Director.

## STANDARDS OF CONDUCT AND CIVILITY

At Sherwood Montessori, we are committed to upholding the highest standards of personal integrity and conduct. These standards are based on our dedication to treating people with dignity,

respect, and civility, and taking individual and collective responsibility for our conduct. The manner in which we conduct ourselves defines us and how we are perceived by others. As school employees, we also serve as role models to our students.

Sherwood Montessori employees are accountable for integrity in conduct and for the consequences of their actions or inactions. The highest of ethical standards are expected in all matters internal, as well as with students, parents, and the community at large. All Sherwood Montessori employees and any individuals acting on behalf of Sherwood Montessori are required to conduct themselves in compliance with the essence of this Standards of Conduct and Civility policy. Any concerns must be promptly reported to a supervisor or the School Director Failure to comply with this policy may result in disciplinary action, up to and including termination.

## PROHIBITED CONDUCT

The following is a list of conduct that is prohibited and will not be tolerated by the School. It is not an all-inclusive list, but rather a list designed to give examples of the types of conduct prohibited by the School.

- Falsification of employment records, employment information, or other School records.
- Recording the work time of another employee or allowing any other employee to record your work time, or allowing falsification of any time sheet, either your own or another's.
- Theft, deliberate or careless damage or loss of any School property or the property of any employee or customer.
- Provoking a fight or fighting during working hours or on School property.
- Participating in horseplay or practical jokes on School time or on School premises where such conduct might be a safety risk or might be interpreted as offensive.
- Carrying firearms or any other dangerous weapons on School premises at any time or while acting on behalf of the School.
- Violation of the Substance and Alcohol policy.
- Insubordination, including but not limited to, failure or refusal to obey the orders or instructions of a supervisor or member of management, or the use of abusive or threatening or abusive language toward a supervisor or member of management.
- Unreported absence on scheduled workdays unless otherwise excused.
- Excessive tardiness or absenteeism unless otherwise excused.
- Unauthorized use of School equipment, time, materials, facilities, or the School name.

- Sleeping or malingering on the job.
- Failure to observe working schedules, including the required rest and meal periods.
- Soliciting other employees for membership, funds, or other similar activity in connection with any outside organization during your working time or the working time of the employee(s) solicited.
- Distributing unauthorized literature or any written or printed material during working time or in work areas. ("Working time" does not include your meal and break periods.)
- Failure to timely notify your supervisor when you are unable to report to work absent extenuating circumstances.
- Failure of an employee to obtain permission to leave work for any reason during normal working hours.
- Abuse of sick leave.
- Violation of the Communication Systems Policy.
- Violation of the Standards of Conduct and Civility Policy.
- Failure to provide a physician's certificate when requested or required to do so.
- Violating the School’s dress code.
- Breaching Confidentiality.
- Making derogatory racial, ethnic, religious or sexual remarks or gestures; any violation of the Harassment and/or Equal Employment Opportunity policy; or using profane or abusive language at any time on School premises or during working hours.
- Violation of any safety, health, security or School rule.
- Negligence or other conduct leading to the endangerment of harm of a child or children.
- Working overtime without authorization or refusing to work assigned overtime.
- Unsatisfactory job performance.
- Willfully or maliciously making false statements regarding any co-worker or submitting a complaint known to be false.
- Yelling at coworkers, that is, raising one’s voice while angry.

- Gossiping about coworkers, that is, talking *about* someone regarding any topic you would be unwilling to talk *to* them about.

## CONFIDENTIAL INFORMATION

You may, during the course of your duties, be advised of certain confidential business matters and affairs of the School regarding its business practices, students, suppliers and employees. Your duties may also place you in a position of trust and confidence with respect to certain trade secrets and other proprietary information relating to the business of the School and not generally known to the public or competitors. Such proprietary information includes student information, competitive strategies, marketing plans, fundraising, personnel information and financial information. You shall not, either during your employment with the School or any time in the future, directly or indirectly:

- Disclose or furnish, directly or indirectly, to any other person, firm, agency, corporation, client, business, or enterprise, any confidential information acquired during your employment;

- Individually or in conjunction with any other person, firm, agency, School, client, business, or corporation, employ or cause to be employed any confidential information in any manner whatsoever, except in furtherance of the business of the School;

- Without the written consent of the School, publish, deliver, or commit to being published or delivered, any copies, abstracts, or summaries of any files, records, documents, drawings, specifications, lists, equipment and similar items relating to the business of the School, except to the extent required in the ordinary course of your duties.

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 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."

Upon an extended leave of absence, request from the School or termination of employment, employees are required to immediately return to the School all property of the School in as good condition as when received (normal wear and tear excepted) including, but not limited to, all files, records, documents, drawings, specifications, lists, equipment and supplies, promotional

materials, and similar items relating to the business of the School. This policy also encompasses any and all identifying or confidential information of all former and current students which is protected under the Family Educational Rights and Privacy Act.

Failure to comply with this policy may result in disciplinary action, up to and including termination.

## 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 an extended learning aide or 1:1 aide, note that the Employee Handbook restricts you from directly communicating with parents as this is the teacher's role, not the role of an aide. 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*

- 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.

## CONFLICTS OF INTEREST

All employees must avoid situations that result in actual or even potential conflicts of interest. Personal, social and economic relationships with competitors, suppliers, customers, parents, or co-employees that may impair an employee's ability to exercise good judgment on behalf of the School or which give the appearance of such impairment create an actual or potential conflict of interest.

Sherwood Montessori expects employees to devote their best efforts to the interests of our school. Sherwood Montessori recognizes your right to engage in activities outside of your employment, which are of a private nature and unrelated to our business. However, outside activities (second jobs, side businesses, clubs, etc.) must not interfere with your ability to fully perform your job duties at Sherwood Montessori or create a conflict of interest with your statutory duty of loyalty to the School. The School may prohibit employees from working with another School or external organization that competes with Sherwood Montessori whether as a regular employee or as a consultant.

If you have any questions whether an action or proposed course of conduct would create a conflict of interest, you should immediately contact the School Director to obtain advice on this issue. A violation of this policy will result in immediate and appropriate discipline, up to and including immediate termination.

## EXPENSE REIMBURSEMENT POLICY

The School reimburses employees for reasonably necessary business expenses incurred within the course and scope of employment. Employees who have incurred pre-authorized business expenses, including, but not limited to mileage, must submit receipts, invoices, or route information fully documenting the expense. Do not incur expenses without prior authorization.

Employees who have incurred business expenses should submit required receipts to the School business office within 30 days of incurring the expense.

# SECTION 12 – SAFETY

## SUBSTANCE AND ALCOHOL POLICY

It is the intent of Sherwood Montessori to promote a safe, healthy and productive work environment for all employees. The School recognizes that the illegal and/or excessive use of drugs and/or alcohol is not conducive to safe working conditions, employees' health, efficient operations or School success.

For purposes of this policy, "illegal drugs" includes, but is not limited to, substances that are prohibited by law (such as cocaine, heroin, etc.), controlled substances, marijuana (including medicinal marijuana, marijuana vaping or other recreational marijuana use), and prescription drugs (if they are not prescribed for the person using them and/or not being used as prescribed). "Drug paraphernalia" means any accessory for the use, possession, manufacture, distribution, dispensation, purchase, or sale of illegal drugs. "Under the influence" means that the employee is affected by alcohol, prescription medication that impairs cognitive or physical functions, and/or illegal drugs in any detectable manner.

The School complies with all Federal and State regulations regarding drug use while on the job. This policy prohibits the following:

- Use, possession, purchase, or offer for sale of illegal drugs, drug paraphernalia or alcohol during working hours, including meal and break periods, or in the presence of pupils;

- Use, possession, purchase, or offer for sale of illegal drugs, drug paraphernalia, or alcohol on School property at any time;

- Use, possession, purchase, or offer for sale of illegal drugs, drug paraphernalia, or alcohol while attending a School function or event;

- Storing alcohol (if unauthorized), illegal drugs, or drug paraphernalia in a locker, desk, automobile, or other repository on the School's premises;

- Refusing to submit to an inspection or testing when requested by administration;

- Being under the influence of illegal drugs, prescription medication that impairs cognitive or physical functions and/or alcohol during working hours, while on the School's premises and/or attending a School function or event.

- Conviction under any criminal drug statute for a violation occurring in the workplace, including failure to notify the School in writing of employee's conviction for a violation of a criminal drug statute occurring in the workplace no later than 5 calendar days after such conviction; or

- Failure to keep all prescribed medicine in its original container.

Employees taking physician-prescribed medications, which impairs the employee's job performance, (including medical prescribed marijuana) should not report to work. In addition, if you are required to take any kind of prescription or nonprescription medication that will affect your ability to perform your job, you are required to report this to the School Director who will determine if it is necessary to temporarily place you on another assignment or take other action as appropriate to protect your safety and the safety of other employees and students.

Employees taking physician-prescribed medication which will not impair their job performance may be required to present a statement from the prescribing physician to the employee's supervisor indicating the duration of the prescription and stating that the use of the prescription will not impair the employee's ability to perform their specific job duties. This policy does not require or request the prescribing physician or the employee to identify any prescription drug or the medical condition for which it is prescribed. No employee shall use or have in their possession on the School premises any prescription medication other than medications currently prescribed by a physician for the employee.

This policy will not be construed to prohibit the use of alcohol at social or business functions sponsored by the School where alcohol is served. However, employees must remember their obligation to conduct themselves appropriately at all times while at School-sponsored functions or while representing the School.

Violation of this Drug and Alcohol Policy may result in disciplinary action, up to and including termination, at the School's sole discretion.

Employees should be aware that participation in a rehabilitation program will not necessarily prevent the imposition of disciplinary action, including termination, for violation of this policy. Employees who undergo voluntary counseling or treatment and who continue to work, if any, must meet all established standards of conduct and job performance.

Compliance with this Drug and Alcohol Policy is a condition of employment at the School. Failure or refusal of an employee to cooperate fully, sign any required document, submit to any inspection, or follow any prescribed course of substance abuse treatment will result in discipline, up to and including termination.

Because the use, sale, purchase, possession, or furnishing of an illegally obtained substance is a violation of the law, the School may report such illegal drug activities to an appropriate law enforcement agency.

## SMOKING

All School buildings and facilities are non-smoking facilities. This includes nicotine and non-nicotine cigarettes including (herbal cigarettes) as well as cigars, pipes, e-cigarettes, vaping and marijuana. Smoking is prohibited within 20 feet of a school building and within 25 feet of a school playground, whichever is farther.

## SECURITY

All employees are responsible for helping to maintain a secure workplace. Be aware of persons loitering for no apparent reason. All staff is expected to question any unknown person seen in the workplace who does not have a visitor's pass. If you are leaving late at night or are in any other situation that presents security concerns or where you do not feel comfortable, please seek the assistance of the School Director other employees or call 911. Report any suspicious persons or activities to the Office Manager or School Director. Never attempt to force an individual to leave the workplace if s/he is uncooperative. Immediately contact your supervisor or school administrators for assistance or call 911. Secure your desk or work area at the end of the day or when called away from your work area for an extended length of time, and do not leave valuable and/or personal articles that may be accessible in or around your work area.

## PARKED VEHICLES

Employees are responsible for their own parked vehicles and the personal possessions within while parked on Sherwood Montessori property. Be cautious: keep school property and/or personal possessions out of sight and lock your car. Insuring your vehicle and personal property against loss and damage is recommended for your protection.

## PERSONAL AUTOMOBILE

Employees who use their own automobiles for travel on authorized school business will be reimbursed for mileage at the rate established by the Internal Revenue Services. Employee must have prior supervisory approval for the use of personal vehicles and must carry, at their own expense, the minimum insurance coverage for property damage and public liability.

## PERSONAL PROPERTY

Sherwood Montessori cannot be responsible and will assume no liability for any loss or damage to employee personal property resulting from theft, fire, or any other cause on Sherwood Montessori's premises, including the parking area, or away from school property while on school business. Sherwood Montessori employees are prohibited from using personal property for work-related purposes unless approved in advance by the School Director.

## SAFETY POLICY

Sherwood Montessori is firmly committed to maintaining a safe and healthy working environment. All employees of the School are expected to be safety conscious on the job at all times. All unsafe conditions or hazards should be corrected immediately. Report all unsafe conditions or hazards to your supervisor or the School Director or Office Manager immediately, even if you believe you have corrected the problem. If you suspect a concealed danger is present on School premises, or in a product, facility, piece of equipment, process or business practice for which the School is responsible, bring it to the attention of your supervisor or the School Director

or Office Manager immediately. Supervisors should arrange for the correction of any unsafe condition or concealed danger immediately and immediately contact the School Director or Office Manager regarding the problem.

All workplace injuries and illnesses must be immediately reported to your supervisor and the Administrative Assistant.

Sherwood Montessori has in place a written Injury and Illness Prevention Program as required by law. It is located in the main office for review and within the Comprehensive School Safety Plan.

### ERGONOMICS

Sherwood Montessori has invested in providing a work environment that is safe for all employees. To lessen the risk of ergonomic hazards, the School will make necessary adjustments to an individual's workstation, educate employees on ergonomic safety, and modify processes when deemed necessary to ensure the well-being and safety of our employees. You should report any ergonomic concerns to the School Director.

### CHEMICAL EXPOSURE WARNING

Employees should be aware that work areas might contain chemicals known to the State of California to cause cancer or to cause birth defects or other reproductive harm. If you have any questions or concerns about possible chemical exposure in your work area, contact the Office Manager. Sherwood Montessori uses chemicals in some of its operations. Employees should receive training and be familiar with the handling, use, storage and control measures relating to these substances if they will use or likely be exposed to them. Safety Data Sheets (SDS) are available for inspection. Employee must follow all labeling requirements.

### 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.

## SECTION 13 – TERMINATION

### VOLUNTARY TERMINATION

Sherwood Montessori will consider an employee to have voluntarily terminated their employment if the employee does any of the following: (1) elects to resign from Sherwood Montessori; (2) fails to return from an approved leave of absence on the date specified without notifying the School for the need for continued leave including failure to communicate with the school; or (3)

fails to report for work without notice to Sherwood Montessori for three consecutive work days. Sherwood Montessori requests that employees provide at least two weeks written notice of a voluntary termination. All Sherwood Montessori property must be returned immediately upon terminating employment. Sherwood Montessori retains the right to accept resignation immediately and pay the amount of straight time compensation an employee would have earned in lieu of further performance.

## INVOLUNTARY TERMINATION

An employee may be terminated involuntarily for, among other reasons, poor performance, misconduct or other violations of Sherwood Montessori's Rules of Conduct as set forth herein. Notwithstanding the foregoing, or anything else contained in this handbook, pursuant to its at-will policy, Sherwood Montessori reserves the right to terminate any employee at any time, with or without advance notice and with or without cause.

## EXIT INTERVIEWS

All employees who leave employment at Sherwood Montessori will be asked to take part in an exit interview with the School Director to communicate their challenges and growth while employed at Sherwood Montessori. Information shared during an exit interview will be treated as confidential to the extent possible. Employees may also fill a form with the exit interview questions in lieu of an in-person meeting.

## VERIFICATION AND REFERENCE POLICY

All requests for employment verification, references or personal information verification or disclosures must be directed to the Administrative Assistant. Only the Administrative Assistant or School Director is authorized to provide verifications or references, or disclose personal information, pertaining to current or former employees.

With respect to verification requests, Sherwood Montessori will disclose only the dates of employment and the title of the last position held. Sherwood Montessori will verify or disclose an employee’s salary history only if the employee provides written authorization for Sherwood Montessori to provide the information. However, Sherwood Montessori will provide information about current or former employees as required by law or court order. Sherwood Montessori may decline to provide any letters of reference for current or former employees. Please refer all questions about this policy to the School Director.

## EMPLOYEE HANDBOOK ACKNOWLEDGEMENT

By my signature below, I acknowledge that I have received a copy of Sherwood Montessori's Employee Handbook, on the date indicated below and agree to my at-will employment as described below. I acknowledge that it is my responsibility to read and review the Employee Handbook carefully. I also acknowledge that it is my responsibility to ask for clarification if I do not understand any of the policies included in the Employee Handbook.

I also acknowledge that I have received a copy of Sherwood Montessori's Harassment, Discrimination and Retaliation Prevention Policy which is in the Employee Handbook. I understand and agree that it is my responsibility to read and familiarize myself with this policy and all the provisions of the Employee Handbook. I understand that Sherwood Montessori is committed to providing a work environment that is free from harassment, discrimination and retaliation. My signature below certifies that I understand that I must conform to and abide by the rules and requirements described in this policy.

I understand that the Employee Handbook contains important information regarding Sherwood Montessori's expectations, policies and guidelines and that I am expected to comply with these expectations, policies and guidelines at all times. I understand that the Employee Handbook does not provide a binding contract, but provides guidelines for personnel concerning some of Sherwood Montessori's policies.

Just as I am free to terminate the employment relationship with Sherwood Montessori at any time, Sherwood Montessori, in its sole discretion, also reserves the right to modify or terminate the employment relationship with me at any time for any or no reason and with or without notice. Further, there is no agreement, express or implied, written or verbal, between the employee and Sherwood Montessori for any specific period of employment, for continuing or long-term employment, or for guaranteed terms and conditions of employment. No one other than the School Director of Sherwood Montessori, with the approval of the Board of Directors, has the authority to alter my employment at-will status, to enter into an agreement for employment for a specified period of time, or to make any agreement contrary to this policy. Further, any such agreement must be in writing and must be signed by the School Director. This is the entire agreement between Sherwood Montessori and me regarding this subject. All prior or contemporaneous inconsistent agreements are superseded. If I have an individually negotiated written employment agreement with Sherwood Montessori, then the terms and conditions of that agreement will prevail to the extent it differs from the policies in this Handbook.

Sherwood Montessori reserves the right to modify, alter, add to or delete any of the policies, guidelines or benefits contained in this handbook at any time with or without notice.

Other than Sherwood Montessori Board of Directors, no other entity or person has the authority to modify this employee handbook.

Employee Name (print)_____

Employee Signature: _____

Date: _____

**Sherwood Montessori**

# NON-EXEMPT EMPLOYEE MEAL PERIOD WAIVER AGREEMENT

**Waiver of First Meal Period** (Applicable only when workday is 6 hours or less)

- I understand that I am entitled to and acknowledge that Sherwood Montessori provides me with an uninterrupted, unpaid thirty-minute meal period whenever I work more than five hours in a workday. I also understand that my first meal period must start before the end of my fifth hour of work (i.e., 5 hours and 0 minutes on the clock).

- I wish to voluntarily waive my right to a thirty-minute meal period when my workday will be completed in six hours or less.

- I understand that I may revoke this agreement to waive my first thirty-minute meal period at any time, in writing, by providing written notice of revocation to the Administrative Assistant. As a result, I understand this waiver will remain in effect each workday unless and until I provide a written notice to the Administrative Assistant revoking this waiver.

**Acknowledging the above, I hereby voluntarily waive my right to a thirty-minute meal period whenever my workday will be completed in six hours or less. If I wish revoke this waiver, I will notify the Administrative Assistant immediately.**

**Second Meal Period** (Applicable only when workday is more than 10 hours but not greater than 12 hours)

- I understand that I am entitled to and acknowledge that Sherwood Montessori provides me with a second, uninterrupted, unpaid thirty-minute meal period whenever I work more than ten hours in a workday. I also understand that my second meal period must start before the end of my tenth hour of work (i.e., 10 hours and 0 minutes on the clock).

- I wish to voluntarily waive my right to a second meal period when my workday will be completed in twelve hours or less, provided that I did not waive my first meal period on the same workday.

- I understand that I may revoke this agreement to waive my second meal period at any time, in writing, by providing written notice of revocation to the Administrative Assistant. As a result, I understand this waiver will remain in effect each workday unless and until I provide a written notice to the Administrative Assistant revoking this waiver.

**Acknowledging the above, I hereby voluntarily waive my right to a second meal period whenever my workday will be completed in twelve hours or less and I did not waive my first meal period on the same workday. If I wish revoke this waiver, I will notify the Administrative Assistant immediately.**

_____

Employee's Printed Name

_____ _____

Employee's Signature Date

# Sherwood Montessori
# NON-EXEMPT EMPLOYEE
# MEAL AND REST PERIOD REPORTING FORM
## (ONE FORM FOR EACH APPLICABLE DAY)

Employee Name (Please Print): _____
Date:_____
Date/Time Issue Occurred: _____
Position:_____

**Reported Issue(s)/Reason**: **(CHECK ALL THAT APPLY AND PROVIDE THE CORRESPONDING REASON FOR THE LATE, SHORT OR MISSED MEAL PERIOD AND/OR MISSED REST PERIOD)**

| **Meal Periods** | **Reason for Missed, Late, Interrupted or Short Meal Period** | | |
|---|---|---|---|
| ☐Missed Meal Period | ☐Voluntary | ☐Involuntary | ☐Other |
| ☐Late Meal Period | ☐Voluntary | ☐Involuntary | ☐Other |
| ☐Interrupted Meal Period | ☐Voluntary | ☐Involuntary | ☐Other |
| ☐Short Meal Period | ☐Voluntary | ☐Involuntary | ☐Other |

**Rest Periods**

| | | | |
|---|---|---|---|
| ☐Missed Rest Period | ☐Voluntary | ☐Involuntary | ☐Other |

Circle/Select Applicable Missed Rest Period: 1 2 3 4

**Voluntary: It was my own choice to refuse an authorized meal or rest period.
Involuntary: Through no choice of my own, I was not able to take a complete and proper meal or rest period.

Please provide details of what happened below regarding your meal period and/or rest period:

_____
_____
_____

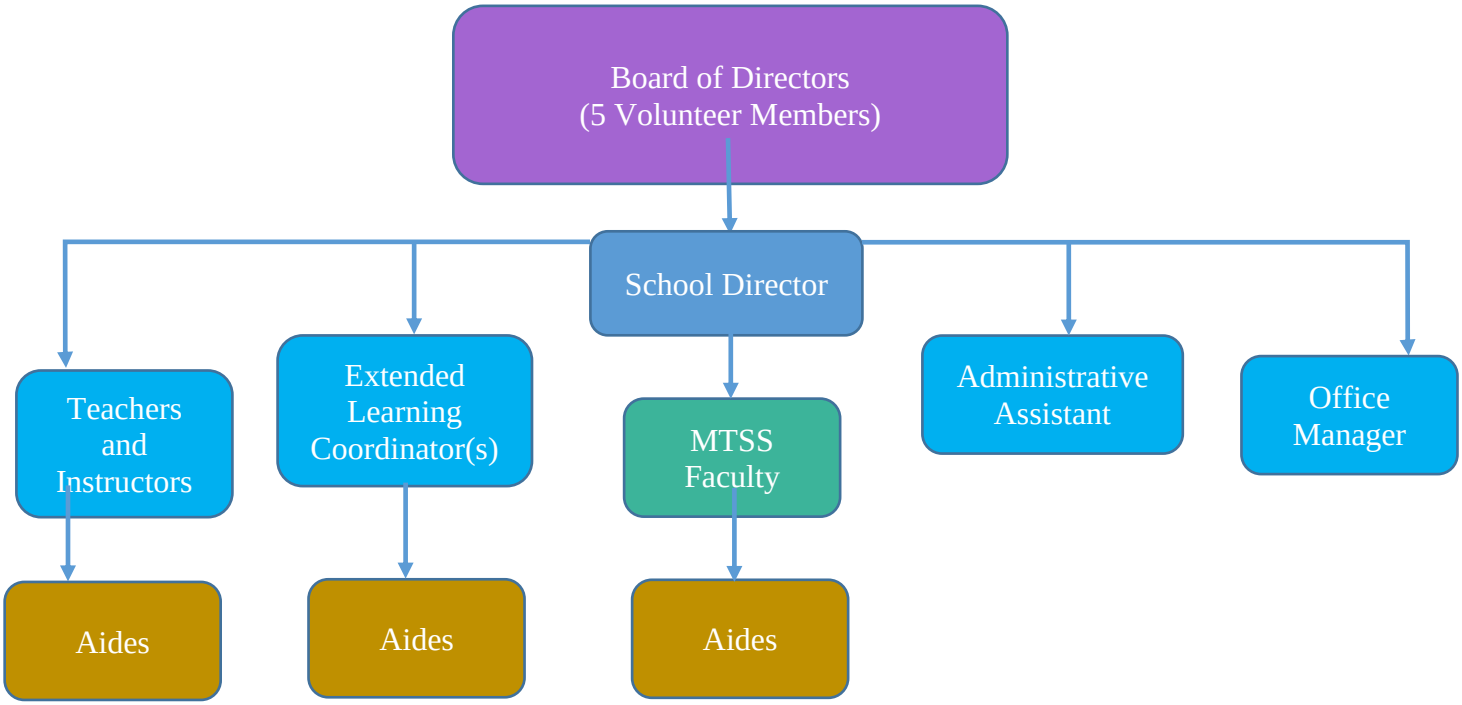
**I understand that I am entitled to an uninterrupted, thirty-minute meal period whenever I work more than five hours in a workday and that my meal period must begin before the end of the fifth hour of work (unless, for workdays of six hours or less, I voluntarily waived my meal period). I understand that I am entitled to a second, uninterrupted thirty-minute meal period whenever I work more than ten hours in a workday and that my second meal period must begin before the end of the tenth hour of work. I also understand that I am authorized, permitted, and strongly encouraged to take a 10-minute (net) paid rest period for every 4 hours worked or major fraction thereof. If I voluntarily miss a meal or rest period or voluntarily experience a late, short, or interrupted meal period (e.g., it was my own choice to refuse an authorized meal or rest period), I understand that I am not entitled to one hour of premium pay for that meal or rest period. If I involuntarily miss a meal or rest period or involuntarily experience a late, short, or interrupted meal period (e.g., I wasn't allowed to take a proper meal or rest period), I understand that I am entitled to one hour of premium pay for that meal or rest period.**

Employee Signature:_____ Date: _____

Supervisor's Signature: _____ Date: _____

FORM MUST BE SUBMITTED IMMEDIATELY AFTER THE APPLICABLE MEAL OR REST PERIOD OCCURS TO THE ADMINISTRATIVE ASSISTANT.

Addendum Form C; Organization Chart and Job Descriptions




Contracted Services

- Business Manager
- Custodial
- School Nurse
- Adapted Physical Education
- Legal Services
- Speech and Language Pathologist
- Pest Management
- Landscaping & Facilities

# 1. 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.
- 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.
- 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.

**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.
- 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.
- Set up new students with accounts in 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**

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 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.

**1:1 Aide**

- Support the success of exceptional children in all educational settings of the school, such as the Learning Center, the general education classroom, the playground, etc.
- Work with the Educational Specialist and classroom teacher to implement Behavior Improvement Plans or other supports that assist assigned student/s in the least restrictive environment (i.e.: always seeking to provide minimal interference to independence for the student/s).
- Use professional communication to seek clarification of desired role in different settings or from different supervisors.
- Demonstrate flexibility in assisting classroom teacher in myriad and changing ways that will maximize benefits to the learning community.
- Model positive attitude and courteous behavior for children, teens and adults, and prepare all other visitors and teachers to model the same respect when working and volunteering in the school.
- Assist the classroom teacher in preparing and maintaining an environment that meets the needs of all learners and is reflective of the Montessori philosophy of order and beauty.

- Communicate ground rules and procedures effectively to all children/teens and remain consistent with consequences.
- Maintain vigilance in supervising students for safety in classrooms and recreation spaces.
- Demonstrate openness to obtaining new skills that will optimize effectiveness in assisting classroom teacher to meet the needs of all students.
- Demonstrate competency in behavior management using cooperative/positive discipline techniques in whole class, small group, and 1:1 settings.
- Demonstrate ability to use computers, copiers, and other office equipment needed to assist classroom teacher in work related duties.
- Implement program developed for exceptional students as communicated by Director of MTSS and classroom teacher.
- Perform other tasks as requested.

**Extended Learning Aide**

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

- Assist 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.
- 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.
- During school hours, 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.
- Support student focus and concentration, minimizes interruption and distraction during work periods and lessons.
- Refrain 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.

**School Psychologist**

Under the supervision of the Director, the School Psychologist manages, evaluates and serves as a consultant for Sherwood Montessori and subcontracted LEAs.

- Lead and facilitate Individual Education Plan (IEP) meetings, including all paperwork, preplanning with teacher, parent, and staff, and all follow-up duties
- Support and advise teachers through instructional challenges, student behavioral difficulties, and act as a parent liaison
- Train or coordinate training for providers on the school team in the effective use of data to drive instruction and on proper IEP development, preparation, and meeting procedures
- May serve as administrative designee for IEP meetings
- Consult and collaborate with local school districts about program services provided and
- Collaborate in evaluation and assessment, and recommend services for students enrolled in the program
- Monitor student progress and annual reviews, and assist with goal and objective development to ensure educational benefit
- Conduct manifestation determination reviews and prepare these assessment reports and documentation as needed
- Develop Behavior Improvement Plans when appropriate
- Conduct psychoeducational assessments and diagnosis of specific learning and behavioral disabilities, including, but not limited to, case study evaluation, recommendations for remediation or placement, and periodic reevaluation of such children
- Perform other job-related tasks as requested by Director

**Speech and Language Pathologist**

- Provides speech therapy services to students in Special Education; maintains a safe and orderly treatment area
- Conducts assessments of students to determine need for identification of communication-related disorders and the need for speech therapy services
- Re-evaluates students' individual speech therapy goals on a regular basis
- Provides reports for use in Individualized Educational Plan (IEP) committees, attends IEP meetings as necessary, and maintains progress notes on student records
- Serve as case manager for students with IEPs in which their only service is speech and language therapy
- Assumes responsibility for developing annual goals and objectives, as well as progress reports, for students with speech services on their IEPs
- Participates in school-based intervention team meetings as needed
- Screens students for potential school-based intervention
- Collaborates with parents and staff regarding plans for speech therapy services

- Perform other job-related tasks as requested by Director

**School Nurse**

- Assumes responsibility for staff-requested and State mandated hearing and vision screening programs in the school
- Conducts appropriate health follow-up screening and referral activities
- Periodically reviews the status of students with identified problems and follows through as needed
- Establishes and maintains student cumulative health records.
- Provides for compliance with mandated regulations for dispensing medications to students at school
- Assumes responsibility for proper verification of student compliance with CHDP and immunizations
- Identifies students with chronic health problems and counsels parents and staff regarding the nature and plan for the illness
- Assembles all pertinent health information and a health and developmental history for students referred for special education testing
- Serves as a medical resource person to school personnel. Provides reports for use in Individualized Educational Plan (IEP) committees, attends IEP meetings as necessary
- Alerts school administration to potential health and safety issues in the school environment
- Participates in continuing education courses
- Perform other job-related tasks as requested

**Position Title: Occupational Therapist**

- Provides occupational therapy services to students in Special Education; maintains a safe and orderly treatment area.
- Conducts assessments of students to determine need for occupational therapy.
- Collaborates with medical personnel and acts as a resource to school personnel in interpreting occupational therapy services.
- Re-evaluates students' individual occupational therapy goals on a regular basis.
- Provides reports for use in Individualized Educational Plan (IEP) committees, attends IEP meetings as necessary, and maintains progress notes on student records.
- Collaborates with parents regarding plans for occupational therapy services.
- Perform other job-related tasks as requested by Director

**P.E. Instructor**

- Teach twice weekly PE classes w/all grade levels
- Align instruction with California Physical Education Standards
- Manage the maintenance of the PE shed and equipment
- Coordinate community involvement including guest speakers, community volunteers, and service learning projects
- Instruct students on safety using equipment and playing sports

- Identify and apply for grants
- Teach health topics during inclement weather using California Standards as a quide
- Work with school director, SMPO members, and staff on relevant fundraising events for the school's general fund
- Submit purchase requests as needed to replenish playground and PE equipment
- Perform other job-related tasks as requested by Director

**Extended Learning Coordinator/s**

- Assure safety of students and staff while attending the AC program
- Supervise program aides and activities as needed
- Create staff and program schedules and communicate schedules, and program plans/ needs with aides
- Lead aides in curriculum and activity plans
- Establish and maintain positive and professional working relationships with students, parents and school staff
- Plan activities and curriculum to enrich student experiences in creative art, physical education, music, nature, science, homework and reading, and social interaction
- Plan for, order and shop for needed supplies to carry out the planned activities, with the approval of the director
- Communicate with parents regarding billing, update accounts records, work with school Business Manager to keep fiscal records accurate
- Maintain records for third parties that supplement parent payments as required by the cooperating agencies
- Maintain records for purchases for program supplies, and snack program
- Maintain regular and supportive communication with parents and director on all aspects of the AC program
- Create snack options for children based on healthy food choices
- Purchase food and create snack calendar to reflect weekly menu
- Lead and assist aides to carry out daily snack preparation, serving, and clean up
- Maintain regular and supportive communication with parents, staff and program director
- Attend regular school staff meetings and hold AC staff meetings as well as curriculum building meetings
- Report concerns regarding children, staff, parents or safety issues in a timely manner to the director, in weekly meetings or immediately if there is a safety concern
- Make recommendations to director regarding the hiring of program aides, supervising and evaluations
- Communicate to ensure adequate coverage of students in the program. Contact support staff when needed

- Provides classified staff trainings to orient new employees to the school's procedures and culture and to continue to develop the skills of experienced employees
- Give guidance to employees regarding job duties when questions or conflicts arise and/or reports to Director questions or conflicts that are unresolved.
- Provide classified staff who are supervising the playground training and guidance related to playground supervision to orient new employees to the school's procedures and culture and to continue to develop the skills of experienced employees
- Create a schedule of supervision of playground and campus areas to be followed by classified staff who are assigned to playground supervision
- Communicate expectation that may be unique to different playground and campus supervision areas, e.g.: monitoring bathrooms, monitoring check in/check out of playground equipment, monitoring hallway, monitoring return to classroom at the conclusion of recess
- Give guidance to employees regarding job duties when questions or conflicts arise and/or reports to Director questions or conflicts that are unresolved.
- Perform other job-related tasks as requested by Director




## Absence Request

**Absence Information**

Employee Name:_____

Type of Absence Requested:

☐ Sick ☐ Vacation ☐ Bereavement ☐ Time Off Without Pay

☐ Military ☐ Jury Duty ☐ Maternity/Paternity ☐ Other

Dates of Absence:
From: _____ To: _____

Reason for Absence:

_____

*Employee Signature* *Date*

**Director Approval**

☐ Approved

☐ Rejected

Comments:

_____

*Director Signature* *Date*



## Absence Verification

**Absence Information**

Employee Name:_____

Type of Absence:

☐ Sick ☐ Vacation ☐ Bereavement ☐ Time Off Without Pay

☐ Military ☐ Jury Duty ☐ Maternity/Paternity ☐ Other

Dates of Absence:
From: _____ To: _____

_____

*Employee Signature* *Date*

From the Employee Handbook:

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.

Sick leave days available before absence:_____

Sick leave days now available:_____

_____

*Director Signature* *Date*

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 24, 2023

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**SUMMARY**

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

**DISCUSSION**

This MOU is basically the same as last year's, updated for this current school year. The contract assures we have a properly licensed school nurse as required by Education Code.

**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, 2023 and continue through June 30, 2024.

(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: _____ By: _____
CCDS Director of Student Support Services

Date: _____ By: _____
CCDS Board Chair

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** August 24, 2023

---

**SUMMARY**

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

**DISCUSSION**

In order to received ESSER funds and Title 1 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)



# 2023–24 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.

By checking this box the LEA certifies that the Local Board has approved the Application for Funding for the listed fiscal year: ☐

## 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.

By checking this box the LEA certifies that parent input has been received from the District English Learner Committee (if applicable) regarding the spending of Title III funds for the listed fiscal year: ☐

## 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)**: ○ No ◉ Yes
ESSA Sec. 1111 et seq.
SACS 3010

*** Title II, Part A (Supporting Effective Instruction)**: ◉ No ○ Yes
ESEA Sec. 2104
SACS 4035

*** Title III English Learner**: ◉ No ○ Yes
ESEA Sec. 3102
SACS 4203

*** Title III Immigrant**: ◉ No ○ Yes
ESEA Sec. 3102
SACS 4201

*** Title IV, Part A (Student and School Support)**: ◉ No ○ Yes
ESSA Sec. 4101
SACS 4127

Save | Return to List

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **POP Resolution**

**Date:** August 24, 2023

---

**SUMMARY**

Approval of this resolution satisfies a legal requirement for employers who offer the type of health benefits Sherwood offers its employees.

**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 (2023)

## For Sherwood Montessori Charter School Section 125 Premium Only Plan Plan Year Ending August 31, 2024

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, 2023**, 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, 2023**, 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

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 24, 2023

---

**SUMMARY**

The Board is 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:** **School Director Report**

**Date:** August 24, 2023

---

**Administrative**

- Current enrollment will be reported at the meeting.
- We completed a move over the summer with middle school moving from Room 9 to Room 1. We are currently renting a storage space to store surplus materials and furniture from the lower elementary classroom that was formerly in Room 1.
- We have some new staff members who are joining us for the 2023-2024 school year and some staff from last year with new assignments:

| New Staff Member/Reassigned Staff Members | Position |
|---|---|
| Leslie Carey | Education Specialist |
| Juliette Madsen (Instructional Aide last year, Extended Day Aide previous to last year) | Extended Day Coordinator |
| Sariah Pilant (BSW Intern last year) | Extended Day Coordinator |
| Kevin Paz (Instructional Aide last year) | PE instructor |
| Natalie Roberson (Instructional Aide last year) | Extended Learning Aide |
| Jordan Freitas | Extended Learning Aide |
| Gisel Montoya | Behavioral Health Counselor |
| Stacey Gertz | Middle School Teacher |
| Kayla Wood | Speech and Language Pathologist |
| Paula Barroso | MSW Intern |
| Carla Lopez | BSW Intern |
| Kristi | MSW Intern |

We are still seeking to hire a Learning Center Aide. Three more Extended Learning Aide positions were offered and as I write this we are currently awaiting their response.

**Legislative**

- All Charters were extended for another year, so we will not be up for renewal until next year.
- All California students will continue to have access to free lunch for an additional year.

# SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

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

**Date:** August 24,2023 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 July 2023 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 833,844.36 as of July 31,2023 for the checking account.
- The expenses in July were for the normal operating cost.

Profit & Loss

- The July Profit & Loss report shows a Net Income of $ -65,316, which was offset by $ 27,120 of July LCF funds deposited in August 2023 along with $ 4,562 of State ELOP and $ 5,575 of Lottery funds.
- Cash Flow
  The school is projected to end the year with a positive cash balance.

# Sherwood Montessori
## Profit & Loss YTD Comparison
July 2023

| | Jul 23 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | 6,178 |
| **Total Income** | 6,178 |
| **Gross Profit** | 6,178 |
| **Expense** | |
| **2000 Classified Salaries** | 19,772 |
| **3000-Employee Benefits** | 18,962 |
| **4000-Books and Supplies** | 1,166 |
| **5000 Services/Other Op. Exp.** | 31,595 |
| **Total Expense** | 71,494 |
| **Net Ordinary Income** | -65,316 |
| **Net Income** | **-65,316** |

**Sherwood Montessori**
**Board of Directors - Vendor Payments Report**
**July 2023**

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| **Jul 23** | | | | | | |
| Bill | 07/01/2023 | | CharterSAFE | 25% DEPOSIT WC | 3601-Workers Comp | 4,463.00 |
| Bill | 07/01/2023 | | CharterSAFE | 25% DEPOSIT LIABILITY | 5400-Liability Insurance | 9,388.00 |
| Bill | 07/01/2023 | | CharterSAFE | PREPAID 6-28-23 | 9330-Prepaid Expendit... | -13,851.00 |
| Check | 07/03/2023 | SBT | Facebook Ads | POSITION HIRING AD | Advertising | 60.21 |
| Check | 07/03/2023 | ACH | Macquarie Equipment ... | Kyocera Copier Lease 2023 JUL | Copier Lease | 223.00 |
| Check | 07/04/2023 | DBT | Amazon.com | PRIME MO DUES | 5300-Dues and Memb... | 16.23 |
| Check | 07/06/2023 | DBT | Safeway | FOOD - SUMMER PROGRAM | Extended Day | 113.90 |
| Check | 07/09/2023 | DBT | Amazon.com | TERRACOTA PLANT POTS | Extended Day | 64.92 |
| Check | 07/09/2023 | DBT | Amazon.com | PERLER BEAD BAG | Extended Day | 9.04 |
| Check | 07/10/2023 | 9701 | California Charter Sch... | 2023-24 MEMBERSHIP DUES | 5300-Dues and Memb... | 1,470.00 |
| Check | 07/10/2023 | 9703 | SchoolWise Technolo... | INV 2704 - TECH/WEB/REG/H... | Contracted Service | 3,000.00 |
| Check | 07/10/2023 | EFT | Directional Ad-Vantag... | CHICO MALL KIOSK | Advertising | 295.00 |
| Check | 07/10/2023 | 9702 | Parsec Education | PARSEC GO DASHBOARD | Contracted Service | 3,931.50 |
| Check | 07/12/2023 | DBT | Amazon.com | WOOD JUMBO CRAFT STICKS | Extended Day | 6.39 |
| Check | 07/12/2023 | DBT | Amazon.com | INSTRUCTIONAL SUPPLIES | Extended Day | 73.53 |
| Check | 07/12/2023 | DBT | Amazon.com | INSTRUCTIONAL SUPPLIES | Extended Day | 88.93 |
| Check | 07/12/2023 | DBT | STAPLES | USB 2.0 DEVICE | Office Supplies | 34.63 |
| Check | 07/13/2023 | DBT | Costco | FOOD/SUPPLIES - SUMMER ... | Extended Day | 360.92 |
| Check | 07/13/2023 | DBT | Costco | FOOD/SUPPLIES - SUMMER ... | Extended Day | 189.72 |
| Check | 07/14/2023 | DBT | HP LEASE 7603 | Lease Payment - Customer ID ... | HP DIRECT LEASE | 319.17 |
| Check | 07/14/2023 | EFT | California Water Servi... | SERVICE - 2023 JULY | Water | 53.21 |
| Check | 07/14/2023 | EFT | Comcast 4454 | SERVICE - 2023 JUN-JUL | Internet Service Provider | 248.13 |
| Check | 07/14/2023 | EFT | Waste Management | SERVICE 2023 JULY | Trash/Recycling | 133.76 |
| Check | 07/14/2023 | ACH | COSTCO VISA CARD | THRU 15TH PURCHASES JU... | SHERWOOD COSTC... | 1,782.38 |
| Check | 07/17/2023 | DBT | Amazon.com | AUTO GARDEN SPRINKLER | Extended Day | 55.40 |
| Check | 07/17/2023 | DBT | FedEx Office | PAMPHLET | Advertising | 74.37 |
| Check | 07/17/2023 | DBT | Safeway | FOOD - SUMMER PROGRAM | Extended Day | 16.97 |
| Check | 07/18/2023 | DBT | Wufoo | SERVICE - 2023 JULY | Online List Management | 19.00 |
| Check | 07/20/2023 | ACH | CharterSAFE | BILLED PREMIUM - LIABILITY ... | 9330-Prepaid Expendit... | 9,388.00 |
| Check | 07/20/2023 | ACH | CharterSAFE | BILLED PREMIUM - WC 2023-... | 9330-Prepaid Expendit... | 4,463.00 |
| Check | 07/20/2023 | 9707 | CatapultK12 | 2023-24 WEBSITE HOSTING I... | Website, Hosting | 1,188.00 |
| Check | 07/20/2023 | EFT | Comcast Business 9110 | SERVICE - 2023 JUL-AUG | Telephone, Landline | 180.62 |
| Check | 07/20/2023 | 9706 | Comcast - Fiber Optic ... | SERVICE - 2023 JULY | Ethernet - Fiberoptic | 2,534.65 |
| Check | 07/20/2023 | EFT | IXL Learning | SERVICE SITE LICENSE - 23-... | Contracted Service | 1,800.00 |
| Check | 07/20/2023 | 9708 | PARK AVENUE PEST... | INV 587537 | Pest Control | 85.00 |
| Check | 07/20/2023 | EFT | PG & E | SERVICE 2023 JULY | Electricity | 535.80 |
| Check | 07/20/2023 | 9709 | Velazquez Flying Car... | SERVICE 2023 JULY - INV 806 | Housekeeping Services | 1,070.00 |
| Check | 07/25/2023 | DBT | Lowe's | WATER HOSES | Maintenance Supplies | 151.51 |
| Check | 07/28/2023 | 9713 | PARK AVENUE PEST... | SERVICE 2023 AUG - INV 587... | Pest Control | 85.00 |
| Check | 07/28/2023 | EFT | Pat Casey | CONTRACT SERVICE - JUL | Business Manager Ser... | 4,700.00 |
| Check | 07/30/2023 | DBT | 1 & 1 Internet Inc. | Internet hosting IONOS - 2023 ... | Website, Hosting | 45.00 |
| Check | 07/31/2023 | 7484 | DUSTIN MURGIA | SUB 7/28/23 6 HRS X 18.50 = ... | Contracted Service | 111.00 |
| **Jul 23** | | | | | | **38,977.89** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** August 24, 2023

---

**SUMMARY**

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

**DISCUSSION**

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

**SECTION 5. VACANCIES**

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

**SECTION 6. DUTIES OF CHAIR**

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

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

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

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

**SECTION 8. DUTIES OF SECRETARY**

The Secretary shall:

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

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

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

4. Be custodian of the records;

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

**SECTION 9. DUTIES OF TREASURER**

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

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

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

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

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

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

**ACTION REQUESTED**

Elect board officers.

# SHERWOOD MONTESSORI

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

Location: Room 1, 1071 E. 16th Street, Chico, CA 95928

***This meeting will also be accessible 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)

## AGENDA

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

**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, Jolynn Aanenson, Tina Hansen-Lewis, Kati Boomgarden, Samantha Lawson

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

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, August 24, 2023.

**B.2 Unaudited Actuals** Approve 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.3.1 Facilities Letter to CUSD**

The Board will be asked to consider approving a letter to the CUSD Board regarding facilities issues.

**ACTION REQUESTED:** Approve letter.

**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.

**E.4.4. Retreat Planning**

The Board will be asked to engage in planning for the upcoming retreat.

**ACTION REQUESTED:** Plan retreat.

**F. FUTURE AGENDA ITEMS**

The Board will be asked to approve a Prop 39 Facilities Request for the 2024-2025 school year.

The Board will be asked to approve a school calendar for the 2024-2025 school year.

**G. ADJOURNMENT** (7:45)

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# SHERWOOD MONTESSORI

Location: Room 1, 1071 E. 16th Street, Chico, CA 95928
***This meeting will also be accessible 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)

## MINUTES

**REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS**
Date/Time: Thursday, August 24, 2023 – 6:00 p.m. 1017 16th St., Chico, CA Room 1A.

**AGENDA**

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

A.1 Land Acknowledgement
A.2 Roll Call Russell Shapiro, Jolynn Aanenson, Tina Hansen-Lewis, Kati Boomgarden, Samantha Lawson

All members present, meeting began after technical difficulties at 6:14 p.m.

**B. CONSENT AGENDA**
B.1 Minutes Approval Consider approval of minutes from Regular Meeting, June 15, 2023.
B.2 Employee Handbook Approval Consider approval of the 2023-2024 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 2023-2024 school year.
B.4 Consolidated Application
The Board will be asked to approve the Consolidated Application for categorical programs.
B.5 Premium Only Plan Resolution
The Board will be asked to approve the POP Resolution for 2023-2024
B.6 MOU with Home Tech Charter Consider approval of a contract to provide ELPAC assessment services to Home Tech Charter

As the consent agenda involved employee issues, Jolynn recused herself. Samantha motioned to approve the consent agenda, Russell seconded. The agenda was approved unanimously.
**PUBLIC COMMENT ON ITEMS NOT ON THE AGENDA** (6:10)

No comments.

**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

Michelle updated the enrollment at 115 students. The Board discussed the current state of district space allocation. The Board also discussed changes in staffing as well as staffing structure due to finances.

E.2.2 Treasurer Report

The Board discussed ADA and funding.

**E.3 Action/Discussion Items**
E.3.1 Election of Officers

After discussion, the following candidates volunteered for officer roles: Russell as Chair, Tina as Vice Chair, Jolynn as Secretary, and Samantha for Treasurer.
Kati made the motion to approve, Tina seconded. The vote was unanimous.

**FUTURE AGENDA ITEMS**
The Board will engage in retreat planning.
The Board will be asked to consider the Unaudited Actuals for the 2022-2023 school year.

The meeting was adjourned at 7:13

**Sherwood Montessori**
**Budget, July 1**
**Charter School Alternative Form**
**ALT Form Budget**
**04 61424 0121475**
**Form ALT**

**CHARTER SCHOOL ALTERNATIVE FORM**

**UNAUDITED ACTUALS 2022-23**

**ORIGINAL BUDGET 2023-24**

**Charter School Name:** Sherwood Montessori

**CDS #:** 04-61424-0121475

**Charter Approving Entity:** Chico Unified

**Charter #:** 0121475

**This charter school uses the following basis of accounting:**

**(Please enter an "X" in the applicable box below; check only one box)**

| | |
|---|---|
| X | **Accrual Basis (Applicable Capital Assets/Interest on Long-Term Debt/Long-Term Liabilities/Net Position objects are 6900, 7438, 9400-9489, 9660-9669, 9796, ar** |
| | **Modified Accrual Basis (Applicable Capital Outlay/Debt Service/Fund Balance objects are 6100-6170, 6200-6500, 7438, 7439, and 9711-9789)** |

| | | 2022-23 Estimated Actuals | | | 2023-24 Budget | | |
|---|---|---|---|---|---|---|---|
| **Description** | **Object Code** | **Unrestricted** | **Restricted** | **Total** | **Unrestricted** | **Restricted** | **Total** |
| **A. REVENUES** | | | | | | | |
| **1.** LCFF Sources | | | | | | | |
| State Aid - Current Year | 8011 | 647,848 | | 647,848 | 632,137 | | 632,137 |
| Education Protection Account Stat | 8012 | 18,510 | | 18,510 | 297,918 | | 297,918 |
| State Aid - Prior Years | 8019 | 74,585 | | 74,585 | | | 0.00 |
| Transfers to Charter Schools in Lie | 8096 | 299,281 | | 299,281 | 270,000 | | 270,000 |
| Other LCFF Transfers | 8091, 8097 | | | 0.00 | | | 0.00 |
| Total, LCFF Sources | | 1,040,224 | 0.00 | 1,040,224 | 1,200,055 | 0.00 | 1,200,055 |
| **2.** Federal Revenues (see NOTE in Sectic | | | | | | | |
| No Child Left Behind/Every Studen | 8290 | | | 0.00 | | | 0.00 |
| Special Education - Federal | 8181, 8182 | | | 0.00 | | | 0.00 |
| Child Nutrition - Federal | 8220 | | | 0.00 | | | 0.00 |
| Donated Food Commodities | 8221 | | | 0.00 | | | 0.00 |
| Other Federal Revenues | 110, 8260-8299 | | 197,539 | 197,539 | | 50,000 | 50,000 |
| Total, Federal Revenues | | - | 197,539 | 197,539 | 0.00 | 50,000 | 50,000 |
| **3.** Other State Revenues | | | | | | | |
| Special Education - State | StateRevSE | | 119,082 | 119,082 | | 71,000 | 71,000 |
| All Other State Revenues | StateRevAO | 449,732 | 377,747 | 827,479 | 78,600 | 85,000 | 163,600 |
| Total, Other State Revenues | | 449,732 | 496,829 | 946,561 | 78,600 | 156,000 | 234,600 |
| **4.** Other Local Revenues | | | | | | | 234,600 |
| All Other Local Revenues | LocalRevAO | 42,482 | | 42,482 | 3,000 | - | 3,000 |
| Total, Local Revenues | | 42,482 | 0.00 | 42,482 | 3,000 | - | 3,000 |
| **5.** TOTAL REVENUES | | 1,532,438 | 694,368 | 2,226,806 | 1,281,655 | 206,000 | 1,487,655 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| **B. EXPENDITURES (see NOTE in Section I** | | | | 2,226,806 | | | 1,487,655 |
| **1.** Certificated Salaries | | | | | | | |
| Certificated Teachers' Salaries | 1100 | 333,994 | 237,943 | 571,937 | 389,006 | 111,014 | 500,020 |
| Certificated Pupil Support Salaries | 1200 | 63,852 | 3,349 | 67,201 | 32,560 | - | 32,560 |
| Certificated Supervisors' and Admi | 1300 | - | - | - | - | - | - |
| Other Certificated Salaries | 1900 | - | - | - | - | - | - |
| Total, Certificated Salaries | | 397,846 | 241,292 | 639,138 | 421,566 | 111,014 | 532,580 |
| **2.** Noncertificated Salaries | | | | | | | |
| Noncertificated Instructional Salari | 2100 | 111,428 | 63,351 | 174,779 | 140,195 | 36,537 | 176,732 |
| Noncertificated Support Salaries | 2200 | 40,757 | 80,441 | 121,198 | 128,714 | 36,000 | 164,714 |
| Noncertificated Supervisors' and A | 2300 | 110,004 | - | 110,004 | 116,000 | - | 116,000 |
| Clerical, Technical and Office Sala | 2400 | 76,654 | - | 76,654 | 84,820 | - | 84,820 |
| Other Noncertificated Salaries | 2900 | 411 | - | 411 | | | 0.00 |
| Total, Noncertificated Salaries | | 339,254 | 143,792 | 483,046 | 469,729 | 72,537 | 542,266 |
| **Description** | **Object Code** | **Unrestricted** | **Restricted** | **Total** | **Unrestricted** | **Restricted** | **Total** |
| **3.** Employee Benefits | | | | | | | |
| STRS | 3101-3102 | 77,827 | 29,818 | 107,645 | 84,846 | 32,909 | 117,755 |
| PERS | 3201-3202 | 42,575 | 6,062 | 48,637 | 50,441 | - | 50,441 |
| OASDI / Medicare / Alternative | 3301-3302 | 32,931 | 11,802 | 44,733 | 38,485 | 10,025 | 48,510 |
| Health and Welfare Benefits | 3401-3402 | 86,072 | 22,015 | 108,087 | 78,518 | 36,557 | 115,075 |
| Unemployment Insurance | 3501-3502 | 3,915 | 1,642 | 5,557 | 8,029 | 2,677 | 10,706 |
| Workers' Compensation Insurance | 3601-3602 | 4,893 | 2,150 | 7,043 | 7,000 | 1,000 | 8,000 |
| OPEB, Allocated | 3701-3702 | - | - | - | - | - | - |
| OPEB, Active Employees | 3751-3752 | - | - | - | - | - | - |
| Other Employee Benefits | 3901-3902 | 7,136 | 7,273 | 14,409 | 4,991 | 1,715 | 6,706 |
| Total, Employee Benefits | | 255,349 | 80,762 | 336,111 | 272,310 | 84,883 | 357,193 |
| **4.** Books and Supplies | | | | 336,111 | | | |
| Approved Textbooks and Core Cur | 4100 | 64 | 275 | 339 | 3,000 | - | 3,000 |
| Books and Other Reference Materi | 4200 | 1,883 | - | 1,883 | 3,000 | - | 3,000 |
| Materials and Supplies | 4300 | 28,183 | 12,005 | 40,188 | 27,400 | - | 27,400 |
| Noncapitalized Equipment | 4400 | - | - | - | 2,000 | 10,000 | 12,000 |
| Food | 4700 | 1,579 | - | 1,579 | 2,000 | - | 2,000 |
| Total, Books and Supplies | | 31,709 | 12,280 | 43,989 | 37,400 | 10,000 | 47,400 |
| **5.** Services and Other Operating Expendit | | | | 43,989 | | | |
| Subagreements for Services | 5100 | - | - | - | - | - | - |
| Travel and Conferences | 5200 | 2,169 | 1,355 | 3,524 | 3,000 | - | 3,000 |
| Dues and Memberships | 5300 | 1,846 | - | 1,846 | 1,700 | - | 1,700 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Insurance | 5400 | 35,997 | - | 35,997 | 38,000 | - | 38,000 |
| Operations and Housekeeping Ser | 5500 | 104,297 | 1,600 | 105,897 | 103,100 | - | 103,100 |
| Rentals, Leases, Repairs, and Nor | 5600 | 15,893 | - | 15,893 | 12,000 | - | 12,000 |
| Transfers of Direct Costs | 5700-5799 | - | - | - | - | - | - |
| Professional/Consulting Services a | 5800 | 146,768 | 27,495 | 174,263 | 156,700 | 35,900 | 192,600 |
| Communications | 5900 | 18,728 | 28,902 | 47,630 | 14,200 | 10,000 | 24,200 |
| Total, Services and Other Operatin | | 325,698 | 59,352 | 385,050 | 328,700 | 45,900 | 374,600 |
| **6.** Capital Outlay | | | | 385,050 | | | |
| (Objects 6100-6170, 6200-6500 m | | | | | | | |
| Land and Land Improvements | 6100-6170 | - | | 0.00 | | | 0.00 |
| Buildings and Improvements of Bu | 6200 | | | 0.00 | | | 0.00 |
| Books and Media for New School l | | | | | | | |
| Expansion of School Libraries | 6300 | | | 0.00 | | | 0.00 |
| Equipment | 6400 | | | 0.00 | | | 0.00 |
| Equipment Replacement | 6500 | | | 0.00 | | | 0.00 |
| Lease Assets | 6600 | | | 0.00 | | | 0.00 |
| Depreciation Expense (accrual bas | 6900 | | | 0.00 | | | 0.00 |
| Amortization Expense - Lease Ass | 6910 | | | 0.00 | | | 0.00 |
| Total, Capital Outlay | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **7.** Other Outgo | | | | | | | |
| Tuition to Other Schools | 7110-7143 | | | 0.00 | | | 0.00 |
| Transfers of Pass-Through Revenu | 7211-7213 | | | 0.00 | | | 0.00 |
| Transfers of Apportionments to Otl | 7221-7223SE | | | 0.00 | | | 0.00 |
| Transfers of Apportionments to Otl | 7221-7223AO | | | 0.00 | | | 0.00 |
| All Other Transfers | 7281-7299 | | | 0.00 | | | 0.00 |
| Transfers of Indirect Costs | 7300-7399 | | | 0.00 | | | 0.00 |
| Debt Service: | | | | | | | |
| Interest | 7438 | | | 0.00 | | | 0.00 |
| Principal (for modified accrual basi | 7439 | | | 0.00 | | | 0.00 |
| Total Debt Service | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Total, Other Outgo | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **8.** TOTAL EXPENDITURES | | 1,349,856 | 537,478 | 1,887,334 | 1,529,705 | 324,334 | 1,854,039 |
| **Description** | **Object Code** | **Unrestricted** | **Restricted** | **Total** | **Unrestricted** | **Restricted** | **Total** |
| **C. EXCESS (DEFICIENCY) OF REVENUES OVER EXPEND** | | 182,582 | 156,890 | 339,472 | (248,050) | (118,334) | (366,384) |
| **D. OTHER FINANCING SOURCES / USES** | | | | | | | |
| **1.** Other Sources | 8930-8979 | | | 0.00 | | | 0.00 |
| **2.** Less: Other Uses | 7630-7699 | | | 0.00 | | | 0.00 |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| **3.** Contributions Between Unrestricted and | | | | | | | |
| (must net to zero) | 8980-8999 | | | 0.00 | | | 0.00 |
| **4.** TOTAL OTHER FINANCING SOURCE | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **E. NET INCREASE (DECREASE) IN FUND I** | | 182,582 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| **F. FUND BALANCE / NET POSITION** | | | | | | | |
| **1.** Beginning Fund Balance/Net Position | | | | | | | |
| a. As of July 1 | 9791 | 587,778 | 197,354 | 785,132 | 587,778 | 197,354 | 785,132 |
| b. Adjustments/Restatements | 9793, 9795 | - | - | - | - | - | - |
| c. Adjusted Beginning Fund Balance | | 587,778 | 197,354 | 785,132 | 587,778 | 197,354 | 785,132 |
| **2.** Ending Fund Balance /Net Position, Jul | | 587,778 | 197,354 | 785,132 | 339,728 | 79,020 | 418,748 |
| **Components of Ending Fund Balance (Modified Acc** | | | | | | | |
| a. Nonspendable | | | | | | | |
| 1. Revolving Cash (equals Object 9 | 9711 | - | - | - | | | 0.00 |
| 2. Stores (equals Object 9320) | 9712 | - | - | - | | | 0.00 |
| 3. Prepaid Expenditures (equals O | 9713 | - | - | - | | | 0.00 |
| 4. All Others | 9719 | - | - | - | | | 0.00 |
| b. Restricted | 9740 | - | 79,020 | 79,020 | - | 79,020 | 79,020 |
| c. Committed | | | | | | | |
| 1. Stabilization Arrangements | 9750 | - | - | - | | | 0.00 |
| 2. Other Commitments | 9760 | - | - | - | | | 0.00 |
| d. Assigned | 9780 | - | - | - | | | 0.00 |
| e. Unassigned/Unappropriated | | | | | | | |
| 1. Reserve for Economic Uncertair | 9789 | 120,000 | - | 120,000 | 120,000 | - | 120,000 |
| 2. Unassigned/Unappropriated Am | 9790M | 467,778 | 197,354 | 665,132 | 219,728 | - | 219,728 |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** September 21, 2023

---

*Instructional Staff was asked to respond to the theme: What is one element of a long-term vision for your class*?

**Transitional Kindergarten/Kindergarten -Teresa Shippen**

Each year, as school begins, we meet our new classes. This involves meeting students, their parents, their families and learning and understanding more about their communities. At Back-to School night I asked each parent to share why they choose a Montessori education for their child. The answers are as varied as are our families. I listen carefully to their ideas, hopes and dreams for their students and our school. There are many goals we will be working towards. The most important of these is that we inspire a sense of curiosity, that we encourage students to be self-disciplined, self-motivated and an important part of our classroom and school community. These visions are interwoven, and worked on in all that we do. Through observation, patience, time and experiences we will all learn and grow towards these goals, with each child finding their place in our classroom.

My long-term vision is to capitalize on each student's "sensitive period", the period of time when a child shows great interest in a particular skill or area of study. We are giving lessons in materials as the child shows interest. On any given day you can observe students intently cutting paper, drawing and writing, reading, learning how to share a book or a desired material or perhaps gently moving a spider from the book corner to a safe area out in our garden. My goal is for lessons to occur naturally and when needed. My long-term vision for this class is to meet each child where they are, and to enable them to learn and grow through these sensitive periods.

My hope is to be able to witness their continued growth through their eighth-grade year. I love being witness to our kids as they mature and grow!

**Transitional Kindergarten/Kindergarten -Adam Mankoski**

I have a long term vision for a totally fluid classroom, where students can make a choice from multiple options in an indoor and outdoor environment. This vision includes a garden, animal care, farm to fork kitchen with lessons in food prep and preservation, outdoor and indoor exercise options, an arts center, STEM center, language land math labs and a robust outdoor space to work and play.

Staffing in this environment would allow students to have freedom to migrate among the environments and try work on what interests them.

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

This board report is written to answer the prompt our director shared with us; What is one element of a long-term vision for your class? I am privileged to be the first Montessori educational experience for many of my students this school year. In addition, many students are joining my class after a history in other Sherwood classrooms. Looking at our classroom there are more students new to room 6 then have experience in room 6. The one element that is absolutely necessary in a long-term vision for our classroom is respect. Respect for ourselves and our surroundings. A foundation of respect builds confidence and comfort for the individual and the community.

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

A long-term vision for my class is a positive belief system.

Just in case that sounds grandiose or cultish, let me explain: I want my students to get so much practice in daily gratitude, helping, and goal-setting that it eventually comes naturally to each of them—at least when they're in my classroom, and at best later on in their adult lives.

I sometimes call the Second Plane "the practice adulthood," because in her chart of The Constructive Rhythm of Life, Montessori presents ages 6-12 as a matched set with ages 18-24, while she shows that infancy resonates better with adolescence. The attitudes and habits that elementary children form toward responsibility, work, learning, and friendship are the ones they'll likely revert back to post-puberty as they enter early adulthood. We can either set them up for success as soon as they start "adulting," or we can inadvertently doom them to relearning life's big lessons with higher stakes.

Before taking attendance each day, I give a brief statement of "goals and gratitude," sharing something I'm thankful for and something I either would like to accomplish or have recently accomplished. Each child is invited to share their own optional "G&G" as well when I call their name. Even though I started this practice to improve my students' mood, I've found over time that it's cheered and motivated me, too.

Whenever possible, we also try to cultivate a growth mindset with phrases like "when you're ready" and "with more practice" rather than "you are" or "you can't" or even "you can." Positive future-framing, such as "Once you can [verb], then you'll be able to [verb]," plants seeds for later accomplishments.

A multi-grade classroom with no aide is an environment rich with opportunities for students to practice helpfulness and community-building, and we do! Some students help by performing an

assigned classroom job, while others cut deals with the teacher to offer some help to a classmate in exchange for more work choices later. Gradually, all of my students become aware that we are negotiating with each other for win-win arrangements.

I recognize that not everybody operates on these assumptions in "the real world" outside our classroom doors. But successful people often do. Satisfied people often do. And it's my sincerely held long-term vision that, with practice, my students can become the next generation of those people.

**4th /5th/6th -Jessi Lusardi**

I am only focusing on the Montessori idea of 'moving students towards independence' in my class this year. Although I would like to cook with my class weekly, take them on outdoor trips, such as a day-long kayaking trip, and take them weekly to work in the Chapman Garden, getting the class to listen and follow directions is challenging at the moment. I believe that moving students towards independence is a realistic goal for this group, and for the minimal support I have in my classroom this year.

The way I rate my success as a teacher can be measured by how many students I am reaching, regardless of their ability level. I believe I should be giving challenging work to students who need it, finding or giving extra support to those who need it, and behavior support for those who need it. Right now, I am not reaching that goal. To be real, I am overwhelmed.

At the moment, I am teaching 4 lessons per day, which is about 60-80 minutes per day. I normally spend about 15-20 minutes on each lesson. I have an aide on Mon 10:35-11:00, Tue/Thurs from 1030-1100, Weds 10:40-11:55, and Friday 10:40-11:45.
While I am teaching grade-level lessons, I am encountering students who are supposed to be doing independent work and are struggling due to academic and behavioral reasons. Without an aide, who would normally be giving academic and behavior support to the students who are supposed to be working independently while I am teaching grade level lessons, I am also trying to manage behavior and give academic support. I am really torn between giving high quality grade level lessons, and supporting those students who need it during their independent work time. Of 7 returning "older" students, only 2 have the maturity to help other students in the classroom.

I would normally have prep during PE, but my students are not regulated enough to handle PE without a second teacher, so I am supporting their success by being outside with the PE teacher. This is not reflective of the PE teacher, who is professional and doing a great job. I am also supporting the substitute teacher in April's class– giving her materials for grade level lessons for 4/5/6 in Math, Cultural Studies, Science, and Writing, as well as behavior and protocol support for challenging students, and curriculum pacing.

**7th/8th Michael Whittemore**

I am hoping to build a positive sense of community that values self-worth and resiliency starting with middle school, to engage and share a positive perspective of the future classes with our younger grades through fundraising projects that go towards our end of year field trip. This will

bring what we do in our community full circle as the younger students will hopefully be empowered and influenced by these interactions to have positive growth and to look forward to being the leaders of our Middle School class in the future.

We will build community by being a part of the bigger community; engaging in field trips working with local businesses and community members to have students see how we can be apart and support our bigger community and how we can bring those lessons and perspective into our school community. In our academics we will do our best as a Middle School to share our knowledge and understanding with the school in engaging ways to show the younger students what we are working on; to have them be apart of what we are working are so we can support the idea of inclusivity in our community to build empathy in our students creating an atmosphere of a want to work with and teach our younger peers on campus.

**7th/8th-Stacy Gertz**

It's only been 3½ weeks of school and I feel pretty connected to our middle-school students! One long-term goal that I feel passionate about is having our students realize that they are not too young to make a difference in our immediate community, our extended community, our families, and the world at large. I feel that this can be achieved by introducing examples of other young people that made profound, positive impacts on their communities throughout the world. I would like to bring in some young role models to share live, watch youtubes, share our own experiences and share some of my previous students' stories that fit and provide opportunities for each of us, individually, to channel our passions. In addition, I would like to expose them to multiple examples of businesses, charities, and ideas by visiting some environments where these situations are being executed. (I am capable of networking these opportunities) Perhaps utilizing group and team efforts to accomplish these goals as well. I, personally, have always felt this way, so I am excited to share some past experiences. I spoke briefly with Michael, and he is on the same page. These students are already compassionate. By continuing to nurture their self-esteem and autonomy, I believe it's endless what WE can achieve this year!!!

**Learning Center-Leslie Carey**

One element of a long-term vision for my class is to provide both educational and social emotional support for all of my students. Part of my role as a Learning Center Teacher is to provide the necessary support that my students need to accomplish their IEP goals and be successful in their General Education class. This is what my college and credential program education taught me. How to data collect, write IEP's, learning strategies, and ways to make learning engaging and hands-on. This is very important to student success, but also equally important is social emotional learning.
I learned very early on when first working with students, even before college, the importance of social emotional learning. I learned the importance of teaching all kids to respect oneself and one another. How important building relationships with your students are, and instilling confidence within each student. Besides academics, I want my students to succeed in

loving to learn. I want my students to succeed in having a growth mindset, knowing how to treat others, and having confidence within themselves. I want to give my students tools to self-regulate their emotions, or know they have a safe place at the school to discuss their traumas or worries.

In sum, my goal is to provide both educational and social emotional support to all of my students. Students need both support to succeed, and I will do everything it takes to provide that support. I want each of my students to be the best version of themselves possible.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** September 21, 2023

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## Administrative

- Updated enrollment will be reported at the meeting.
- A list of employees, independent contractors, and interns to date follows. We are currently fully staffed with positions included in the original budget plus one support aide position that was not in the original budget, but are looking to add to our substitute list.

### 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 | Leslie Carey |
| School Psychologist | Jolynn Aanenson |
| Speech and Language Pathologist | Kayla Wood* |
| School Nurse | Natalie Wren* |
| Occupational Therapist | Jen Moreno |
| Instructional Aide: Learning Center | Jordan Isom |
| Instructional Aide: Support | Caitlin McKinnon |
| Instructional Aide: Support | Ciera Yokum |
| Behavioral Health Counselor | Gisel Montoya |

**General Education**

| | |
|---|---|
| TK/Kindergarten Teacher | Teresa Shippen |
| TK/Kindergarten Teacher | Adam Mankoski |
| $1^{st}/2^{nd}/3^{rd}$ Teacher | Anne Adams |
| $1^{st}/2^{nd}/3^{rd}$ Teacher | Marlo Knox |
| $4^{th}/5^{th}/6^{th}$ Teacher | April Pearce |

| | |
|---|---|
| 4th/5th/6th Teacher | Jessi Lusardi |
| 7th/8th Teacher | Michael Whittemore |
| 7th/8th Teacher | Stacy Gertz |

**Specialists**

| | |
|---|---|
| Physical Education | Kevin Paz |
| Wellness Counselor | Laura Swanson |
| Title 1 Reading Instructor | Hunter Milkovitz |
| MSW Intern | Paula Barroso |
| BSW Intern | Carla Lopez |
| Custodians | Hernandez Cleaners* |
| Maintenance & Landscaping | Andrew Bays* |
| Maintenance | Barney Kerr* |
| Tech Support | Steve Duke* |
| Cooking Instructor | Kimberly Fellner |

**Instructional & Extended Day Aides**

| | |
|---|---|
| Coordinators | Juliette Madsen and Sariah Pilant |
| Aide | Natalie Roberson |
| Aide | Jackie Contreras |
| Aide | Briana Valdez |
| Aide | Zachariah Curello |
| Aide | Gena Chambers |
| Aide | Evan Kerr |
| Aide | Aanika Kerr |

*indicates independent contractor

## Safety

- We have had a high number of student and staff absences due to illness already this year. Although we have a goal to increase regular attendance, we seem to be at the mercy of microbes who are unrelenting.

## Legislative

- AB 1604 (Bonta) seeks to revise the Charter School Facilities Grant Program (SB 740) which currently partially funds facilities costs for charter schools located in low-income areas or enroll a majority of students who have low-income. The revisions are red tape that would drive up interest rates for the schools, introduce new requirements in operations, and create obstacles for them to obtain facilities. Sherwood is not eligible for SB 740 because we are on CUSD property under Prop 39.

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

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

**Date:** September 21, 2023 Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of August 2023 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 810,274.82 as of August 31,2023 for the checking account.
- The expenses in August were for the normal operating cost.

Profit & Loss

The August Profit & Loss report shows a Net Income of $ -55,568, which was offset by $ 27,120 of August LCF funds deposited in September 2023 along with $ 4,562 of State ELOP funds, and prepaid expense of $ 7,383. The actual Net Income was $ -16,503.

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

# Sherwood Montessori
## Profit & Loss YTD Comparison
August 2023

| | Aug 23 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | 63,533 |
| **Total Income** | 63,533 |
| **Gross Profit** | 63,533 |
| **Expense** | |
| **1000 Certificated Salaries** | 45,816 |
| **2000 Classified Salaries** | 15,590 |
| **3000-Employee Benefits** | 29,246 |
| **4000-Books and Supplies** | 6,327 |
| **5000 Services/Other Op. Exp.** | 22,123 |
| **Total Expense** | 119,101 |
| **Net Ordinary Income** | -55,568 |
| **Net Income** | **-55,568** |

**Sherwood Montessori**
**Board of Directors - Vendor Payments Report**
**August 2023**

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 08/01/2023 | DBT | Magnolia Montessori for All | PROFESSIONAL DEVELOPMENT | Contracted Service | 771.23 |
| Check | 08/01/2023 | DBT | Chico U Lock It Self Storage | MONTHLY STORAGE UNIT 450 ... | Other Rentals | 130.00 |
| Check | 08/01/2023 | 9715 | Patrick Bossetti | INSTALLATION OF RUCKUS S... | Contracted Service | 1,666.00 |
| Check | 08/01/2023 | ACH | Macquarie Equipment Capi... | Kyocera Copier Lease 2023 AUG | Copier Lease | 223.00 |
| Check | 08/01/2023 | DBT | Facebook Ads | AD FOR POSITION | Advertising | 11.78 |
| Check | 08/01/2023 | ACH | CharterSAFE | BILLED PREMIUM - LIABILITY 2... | 5400-Liability Insurance | 3,129.00 |
| Check | 08/01/2023 | ACH | CharterSAFE | BILLED PREMIUM - WC 2023-24... | 3601-Workers Comp | 1,488.00 |
| Check | 08/02/2023 | DBT | Office Depot | OFFICE SUPPLIES | Office Supplies | 318.87 |
| Check | 08/04/2023 | DBT | ZOOM | ZOOM MEETINGS 2023/24 | ONLINE MEETING PROVID... | 157.40 |
| Check | 08/07/2023 | DBT | CustomMagnetsDirect | CUSTOM MAGNETIC ADVERTI... | Advertising | 394.14 |
| Check | 08/08/2023 | DBT | Amazon.com | CHART TABLE PAD | Instructional Supplies | 19.73 |
| Check | 08/08/2023 | DBT | Amazon.com | GRAPH PAPER | Instructional Supplies | 21.10 |
| Check | 08/08/2023 | DBT | Amazon.com | WOOD PENCILS | Instructional Supplies | 16.23 |
| Check | 08/09/2023 | DBT | Chico Pet Works & Pet Sta... | KING KRILL ZML FOOD | Instructional Supplies | 45.44 |
| Check | 08/10/2023 | 9716 | Advanced Document | SERVICE - 2023 JULY | Copier Lease | 192.34 |
| Check | 08/12/2023 | DBT | Meta Ads | ACC ID 101522955268469887 | Advertising | 250.00 |
| Check | 08/13/2023 | DBT | Facebook Ads | AD FOR POSITION | Advertising | 250.00 |
| Check | 08/13/2023 | DBT | Amazon.com | MAGNIFYING GLASS | 4300-Materials and Supplies | 8.00 |
| Check | 08/13/2023 | ACH | COSTCO VISA CARD | THRU 15TH PURCHASES AUG ... | SHERWOOD COSTCO VISA | 176.42 |
| Check | 08/14/2023 | | Velazquez Flying Carpet Man | SERVICE 2023 AUG - INV 811 | Housekeeping Services | 580.00 |
| Check | 08/14/2023 | EFT | Waste Management | SERVICE 2023 AUG | Trash/Recycling | 140.44 |
| Check | 08/14/2023 | | Steven Duke | TECH SUPPORT INV 007 | Contracted Service | 195.00 |
| Check | 08/14/2023 | EFT | Comcast 4454 | SERVICE - 2023 JUL-AUG | Internet Service Provider | 248.97 |
| Check | 08/14/2023 | EFT | California Water Service C... | SERVICE - 2023 JUL | Water | 26.22 |
| Check | 08/14/2023 | | City of Chico | SERVICE - 2023 JUL | Sewer | 28.87 |
| Check | 08/14/2023 | EFT | HP LEASE 7603 | Lease Payment - Customer ID 79... | HP DIRECT LEASE | 319.17 |
| Check | 08/14/2023 | 9720 | CUSD | 2023-24 OVERPAYMENT OF IN-... | Due to CUSD - In-Lieu | 1,269.00 |
| Check | 08/15/2023 | DBT | Michaels | SUPPLIES | Instructional Supplies | 127.32 |
| Check | 08/15/2023 | DBT | Office Depot | SUPPLIES | Instructional Supplies | 133.99 |
| Check | 08/15/2023 | DBT | Target | OFFICE SUPPLIES | Office Supplies | 135.03 |
| Check | 08/15/2023 | DBT | Amazon.com | INSTRUCTIONAL SUPPLIES | 4300-Materials and Supplies | 98.47 |
| Check | 08/16/2023 | 9722 | TELCOM DATA, LLC | HANDSET AND CORD - VANES... | Telephone, Landline | 51.96 |
| Check | 08/16/2023 | 9721 | North State Parent Magazine | CHARTER SCHOOL DIRECTORY | Advertising | 275.00 |
| Check | 08/16/2023 | EFT | Comcast Business 9110 | SERVICE - 2023 AUG-SEP | Telephone, Landline | 182.69 |
| Check | 08/16/2023 | DBT | Amazon.com | | Instructional Supplies | 9.73 |
| Check | 08/16/2023 | DBT | Amazon.com | | Instructional Supplies | 101.34 |
| Check | 08/16/2023 | DBT | Amazon.com | | Instructional Supplies | 51.40 |
| Check | 08/17/2023 | DBT | Amazon.com | FIRST AID KIT | 4300-Materials and Supplies | 21.64 |
| Check | 08/17/2023 | DBT | Wufoo | SERVICE - 2023 AUG | Online List Management | 19.00 |
| Check | 08/18/2023 | DBT | Focal Point Landscape Sup... | DECOMPOSED GRANITE - INV ... | Maintenance Supplies | 309.97 |
| Check | 08/18/2023 | DBT | Focal Point Landscape Sup... | WALK ON BARK | Maintenance Supplies | 284.42 |
| Check | 08/20/2023 | EFT | PG & E | SERVICE 2023 JUL-AUG | Electricity | 849.88 |
| Check | 08/20/2023 | DBT | Amazon.com | US COINS STICKER PACK | Instructional Supplies | 20.13 |
| Check | 08/21/2023 | DBT | Amazon.com | WALL MAP SET | Instructional Supplies | 32.37 |
| Check | 08/21/2023 | DBT | Costco | SNACKS | Food (Instructional) | 468.15 |
| Check | 08/21/2023 | DBT | Office Depot | SUPPLIES | Office Supplies | 119.70 |
| Check | 08/21/2023 | DBT | Amazon.com | JOURNAL NOTEBOOKS | Instructional Supplies | 61.68 |
| Check | 08/21/2023 | DBT | Amazon.com | NGW WALL MAP | Instructional Supplies | 36.31 |
| Check | 08/22/2023 | DBT | Amazon.com | OUTDOOR UTILITY WAGON | PE | 96.83 |
| Check | 08/22/2023 | DBT | Office Depot | BADGE HOLDER | Office Supplies | 102.97 |
| Check | 08/23/2023 | DBT | Safeway | FLOUR-YEAST | Food (Instructional) | 11.58 |
| Check | 08/23/2023 | DBT | Office Depot | SUPPLIES | Instructional Supplies | 134.20 |
| Check | 08/23/2023 | DBT | Johnny's Chico Lock and S... | KEYS | Office Supplies | 24.03 |
| Check | 08/23/2023 | DBT | Amazon.com | HAND HELD RADIO | Office Supplies | 184.00 |
| Check | 08/23/2023 | DBT | Verizon Wireless | SERVICE 2023 AUG | Telephone, Cellular | 94.39 |
| Check | 08/23/2023 | DBT | Amazon.com | WHITE BOARD EASEL | PE | 64.84 |
| Check | 08/23/2023 | DBT | Costco | STAMPS | Postage | 66.90 |
| Check | 08/23/2023 | DBT | Costco | COOKING | Instructional Supplies | 13.99 |
| Check | 08/23/2023 | DBT | Amazon.com | AUGUST PRIME FEE | 5300-Dues and Membership | 16.23 |
| Check | 08/24/2023 | EFT | Directional Ad-Vantage Hol... | CHICO MALL KIOSK | Advertising | 295.00 |
| Check | 08/24/2023 | EFT | Adams, Anne L | SNACKS | Food (Instructional) | 15.96 |
| Check | 08/24/2023 | DBT | Amazon.com | THERMAL ROLL LAMINATING F... | Instructional Supplies | 95.96 |
| Check | 08/24/2023 | DBT | Walmart | MAINTENANCE | Maintenance Supplies | 73.52 |
| Check | 08/24/2023 | DBT | Walmart | COOKING | Instructional Supplies | 15.13 |
| Check | 08/24/2023 | DBT | Craigslist | LEARNING CENTER AIDE AD | Advertising | 20.00 |
| Check | 08/24/2023 | 9724 | CUSD | 2023-24 FUA INV 24-00020 | CUSD FUA Charges | 3,123.66 |
| Check | 08/24/2023 | 9725 | PARK AVENUE PEST CO... | SERVICE 2023 AUG - INV 587545 | Pest Control | 85.00 |
| Check | 08/24/2023 | 9726 | Wilgus Fire Control, Inc. | ANNUAL SERVICE - FIRE EXTI... | Contracted Service | 214.00 |
| Check | 08/24/2023 | 9727 | Voltage Specialist | Annual fire alarm monitoring Sep ... | Contracted Service | 350.00 |
| Check | 08/24/2023 | 9728 | Stacy Gertz | LIVESCAN | LiveScan and TB Test Servi... | 66.00 |

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 08/25/2023 | DBT | WINCO FOODS | ICE CREAM PARTY | Food (Instructional) | 98.85 |
| Check | 08/25/2023 | 9730 | Hernandez Cleaning Service | SERVICE 2023 JULY QUOTE | Housekeeping Services | 1,500.00 |
| Check | 08/27/2023 | 7490 | Adam Mankoski | SUPPLIES | Instructional Supplies | 283.61 |
| Check | 08/27/2023 | 7491 | Zach Cerullo | PBIS AND CPI TRAINING - 10 H... | Extracurricular Services | 185.00 |
| Check | 08/27/2023 | 7492 | LESLIE CAREY | 10 HOURS CPI TRAINING | Extracurricular Services | 185.00 |
| Check | 08/27/2023 | EFT | Vanessa Aripez | CALPADS TRAINING-RED BLUFF | 5200-Travel and Conferences | 56.59 |
| Check | 08/28/2023 | DBT | Amazon.com | HAND CALL BELL | Instructional Supplies | 36.78 |
| Check | 08/28/2023 | DBT | Amazon.com | COLORED SENTENCE STRIPS | Instructional Supplies | 8.11 |
| Check | 08/28/2023 | DBT | Lakeshore Learning | CLASSIC GLOBE | Instructional Supplies | 86.26 |
| Check | 08/29/2023 | DBT | BARNES & NOBLE BOOK... | NIGHT JOHN-12 90.80+.01 | Instructional Supplies | 90.80 |
| Check | 08/29/2023 | DBT | Amazon.com | ROOM RUGS | Instructional Supplies | 205.66 |
| Check | 08/29/2023 | DBT | Craigslist | JOB AD | Advertising | 20.00 |
| Check | 08/30/2023 | DBT | Amazon.com | TEMPERA PAINT-PUMP | Instructional Supplies | 137.34 |
| Check | 08/30/2023 | DBT | Amazon.com | VISUAL TIMER | Instructional Supplies | 61.68 |
| Check | 08/30/2023 | DBT | Amazon.com | BLACK DUCT TAPE | Instructional Supplies | 36.90 |
| Check | 08/30/2023 | DBT | Amazon.com | MEDICINE CUPS | Instructional Supplies | 12.98 |
| Check | 08/30/2023 | DBT | Amazon.com | BLACK LANYARDS | Office Supplies | 13.85 |
| Check | 08/31/2023 | 7495 | Heidemarie Shepherd | LIVESCAN | LiveScan and TB Test Servi... | 66.00 |
| Check | 08/31/2023 | DBT | Amazon.com | LOCKABLE STORAGE CABINET | Instructional Supplies | 106.63 |
| Check | 08/31/2023 | DBT | Facebook Ads | JOB AD | Advertising | 20.00 |
| Check | 08/31/2023 | EFT | California Water Service C... | SERVICE - 2023 AUG | Water | 31.48 |
| Check | 08/31/2023 | EFT | Pat Casey | CONTRACT SERVICE - INV 23/... | Business Manager Services | 4,700.00 |
| Check | 08/31/2023 | EFT | Blue Shield of California | SEPTEMBER BILL PAID ONE D... | 3401-Health Benefits | 7,383.84 |
| **TOTAL** | | | | | | **35,958.08** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Facilities Letter to CUSD Board of Education**

**Date:** September 21, 2023

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**SUMMARY**

Chico charter boards are considering sending a letter to the CUSD Board of Education urging them to find a fair approach to funding the shortfall for the Inspire School of Arts and Sciences build.


**DISCUSSION**

At the August 23rd CUSD Board Meeting, a Discussion/Action Item was presented for consideration regarding funding the shortfall for the Inspire build. Both options presented were to take funds that would be generated by the potential passage of a bond from other charters. The options presented did not include one where district bond revenues would be contributed. Charters were not consulted and became aware of the agenda item only when it was posted publicly. Since then, charters have voiced their concerns and there have been two meetings with district leadership, with more planned. The goal is to find an alternative solution that would be fair and consider the benefit of all public school students so that the bond could go to voters with the potential for success.

These were the options presented on the agenda on August 23rd for the Inspire Project Pending Passage of November 2024 General Obligation Facilities Bond:

*1. With the passage of the November 2024 bond measure, $10 million of the charter school allocation comes off the top and is allocated directly toward the Inspire project and the remaining charter school allocation is distributed based on facility needs per a Charter Facilities Plan.*
*2. With the passage of the November 2024 bond measure, $10 million of the charter school allocation comes off the top and is allocated directly toward the Inspire project and the remaining charter school allocation is distributed based on In-District Charter School Average Daily Attendance (ADA).*

Becky Brown, Principal/Superintendent of Inspire School of Arts and Sciences, has drafted the attached letter to the CUSD Board and is asking local charter boards to consider signing it. This action would demonstrate unity among charter entities in our sincere desire to be able to support an equitably written bond for the benefit of charter and district students in Chico.

**ACTION REQUESTED:** Approve letter to CUSD Board of Education.

Chico Unified School District Board of Education
1163 East Seventh Street
Chico, CA 95928-5999

October 12, 2023

Dear Members of the Chico Unified School District Board:

On behalf of our charter school communities, we extend our gratitude for the Chico Unified School District's efforts to support adequate school facilities for charter and non-charter students across the district. We know that Chico Unified's decision to include our charter schools in the Measure K bond set a precedent in our region, and that it ensured students in Chico and beyond were learning in safe and healthy school environments.

We also know that a Chico charter school is facing a dilemma: the Fremont Street Project for Inspire School of Arts and Sciences cannot be completed unless funding is found for a $10 million shortfall. At the CUSD Board meeting on August 23, the district proposed a solution to the problem that would take $10 million off the top of funds allocated to the charters in a future bond. As charter school leaders, we cannot support this proposed solution for the following reasons:

- The charters are not a single entity, but multiple LEAs, each with its own governing board whose oversight and authority do not extend to Inspire. The district is a single LEA whose governance structure could support a timely decision on Inspire facilities, and whose Board has authority as Inspire's authorizing entity.
- The charters do not have the fiscal capacity to extend a loan to Inspire, or to provide facilities funding out of their bond allocations to meet the $10 million shortfall. Chico Unified has a fiscal capacity far beyond that of the charter LEAs, with an enrollment of around five times that of the charters combined, a larger share of state and local revenues per student, and the ability to put out bonds repaid by taxpayers.
- By supporting the move to Fremont Street with district dollars, Chico Unified benefits by moving Inspire off the Chico High campus, and by facilitating the development and improvement of land owned by the district.

For these reasons, we would like to bring forward an alternate solution to Inspire's funding shortfall. We propose that the district take the $10 million needed to cover the shortfall for Fremont Street off the top of the total future bond funds. Less the $5 million projected to be allocated to Inspire based on ADA, the remaining $5 million off the top of the total bond amount represents a compromise that would require both the district and the charters to make a reasonable sacrifice for the good of students living in our area who choose Inspire for their high school experience.

We encourage you to look to the Natomas Unified School District as an example of the ways charters and their authorizing district have worked together to develop school facilities. Generally, the original build for each Natomas charter campus was funded 50/50 through local and state bonds. Any additions to the campuses have been typically funded through a 50/50 split between the district and the charter school. In every case the school and the district have tried to work together to maximize the resources to which they all have access depending on their organizational structure and community. For example, Natomas Unified can levy bonds but the charters have access to charter school grants and parent communities willing to fundraise.

We recognize that positive relationships between the district and the charters are essential to the effective functioning of each of our educational communities. We thank you for your willingness to allow us a voice at the table, and we commit to joining you in a unified effort to rally support and get this bond passed in 2024.

In gratitude for your time and consideration,

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Governance: Chair's Report**

**Date:** September 21, 2023

---

Welcome back (again) to the new school year! The first month is in the books and now we can move forward with the rest of the school year. At the last meeting, I noted that it seems we are out of the major phase of uncertainty started with the Camp Fire and exasperated by COVID. With this new iteration of the Board of Directors, I want us to focus on the long vision and develop a five-year plan. How can we best serve Sherwood Montessori by acknowledging its current strengths and shortcomings, embracing and building on the former while addressing the latter? Above all, we need to keep the focus on the Mission Statement to create the best Montessori public school option within our abilities.

To that end, we will need to work together as a Board of Directors. Unfortunately, time constraints and tight funding did not allow for a robust training for new directors these past two years. Instead, there was a crash course on the Brown Act and other legal issues. However, it is clear that isn't enough. Our volunteer role is serious and has legal and financial ramifications. Sherwood Montessori is a public school, funded to a large part by tax dollars. If Board members do not follow the legal guidelines, we will be held accountable.

Fortunately, it is pretty straightforward and easy to follow the rules. As a Board member, you serve the interests of the school—not a representation of the community. That is, you are not the voice of the teachers, or the students, or any subset. Most of all, you are not the voice of your personal interests. Second, all Board business must be carried out in public meetings, not in parking lots or classrooms or over phone calls. You have to be able to live two lives and keep them separated. Thirdly, you need to be part of team and respect each other. It is great to hear respectful dissent and challenges—that is how we grow.

To that end, let me give some comments, stolen mostly from the Rocklin Academy of Schools Board Governance Handbook:

- To be effective governors, we need to maintain a unity of purpose, agree to and govern within our roles, create and sustain a positive culture, and maintain the focus on improving student success.

At meetings, we need to:

- Make sure we hear each other by not interrupting, being present, and prepared.
- Keep confidential items confidential
- Operate with trust and stay on task
- Assume good intentions even when they go against your own goals
- Put aside personal issues while at the Board meeting
- Filter out the business of adults and focus on the needs of the students.

Remember, we govern the school and have one employee, the director. Michelle, as director, is in charge of all other staff. We do not employ or evaluate staff as Board members though we can certainly engage in conversations to learn about what is happening at the school.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** September 21, 2023

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The Board is asked to appoint members to the required committees and suggested committees for the 2023-2024 school year. The Board may choose to create standing committees and/or ad hoc committees in addition to the following required committees.

## Required Sherwood Board Committees

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

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

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

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

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

SHERWOOD MONTESSORI

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

Date/Time: **Thursday, October 19, 2023 – 6:00 p.m.**
Location: 1071 E. 16th Street Room 1

**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, Tina Hanson-Lewis, Samantha Lawson, Kati Boomgarden

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

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, September 21, 2023.

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

**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**

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.

*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 Policy Revision** (6:30)

Our current policies regarding parent observations and volunteering need revision to be consistent.

**ACTION REQUESTED:** Approve policy revisions.

**E.3.2 Measure K Lunch Project Proposal** (6:40)

The school would benefit from serving lunch on its own side of campus.

**ACTION REQUESTED**: Approve project proposal.

**E.3.3 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** Appointment of interim board member in accordance with Bylaws Section 10: Vacancies.

**ACTION REQUESTED:** Appoint board member.

**F. FUTURE AGENDA ITEMS** (7:05)

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

**G. PUBLIC EMPLOYEE DISCIPLINE/DISMISSAL/RELEASE** (7:05)

(f) With respect to every item of business to be discussed in closed session pursuant to Section 54957.6

**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 Board of Directors Meeting 9/21/2023

Meeting started at 6:13pm.

A.2 Roll Call: Russell Shapiro, Jolynn Aanenson, Sami Lawson, Kati Boomgarden, Tina Hansen-Lewis (absent).

B.1 Minutes from last meeting and unaudited actuals: Sami Lawson motioned; 4 approvals

Sami Lawson noted April's staff report was absent. Russell noted it missed the 72 hr. public meeting requirement. No comments on staff reports.

S. Lawson questioned at what point in agenda the board policies are discussed. Russell commented this would be covered under Board Governance.

Instructional reports were reviewed and comments from Board members commented. Reviewed a variety of Montessori instructional methods

Public Comment: complaints regarding the reduction in aides for this year were heard, as well as concern with a teacher being gone for the month of September. The Director noted funding is low and this resulted in the reduction in hours for aides. All teachers continue to have aides in their classrooms but not for the entire day. Additionally, there are very substitutes available in all schools, not just Sherwood.

E.2.1 Director's report: Enrollment 116 – up from last year. Pat Casey: Absences of students average 9 per day so far (90%).

E.2.2 Treasurer Report Good news: broke even this month. We budgeted for 95 ADA and we're now at 110 ADA. We need more enrollment and better attendance. "Savings account" is not that – we had a one-time influx of dollars and it is coming to an end. We have enough money to put an aide in every room but we are draining our reserve to the point that, next year, we could have no aides. If Pat presents a budget that shows we're spending more than we're getting, CUSD will tell us to cut out expenses. This is not unique to Sherwood – all schools are struggling with this.

STRS costs for the school also went up dramatically, as did health insurance, but we had the money to cover it. PERS went up also. We are paid on last year's attendance, and they do not always "make it up". If the state sees a shortfall, the state is under no obligation to pay at that time.

S. Lawson inquired about looking for grants. Pat commented that grants do not cover aides or salaries. They are very specific. A member of the audience questioned keeping counselor, nurse, psychologist? Pat Casey stated we are required to have them, per state law.

Aides need to be paid more money if they are employed more than 6 hours, so we cannot extend the hours of our current aides. We don't have the money.

Russell recommended the Budget Committee dive deeper.

The Board Chairman cautioned new board member S. Lawson to not speak as a parent as she is a board member at the moment.

E.3 Facilities letter: Michelle spoke regarding CUSD's potentially inequitable disbursement of funds amongst the charters. The Charters recommended a draft letter to send to CUSD requesting more equitable distribution. Jolynn motioned to approve the letter; Sami seconded it.

E.4.2 Governance
Russell noted policies can be changed.
Policy is in existence allowing normalization of classrooms for 6 weeks at beginning of the year where no volunteers should be in the class until it is over.

E.4.3. Sami Lawson elected to Budget Committee.

Kati volunteered to join Safety Committee.

Sami and Russell will be on the Elections Committee.

E.4.4 Retreat put off until next meeting due to time constraints.

F. Prop 39 and school calendar "future items" will be discussed at future meetings due to time constraints.

Meeting adjourned at 8:04 pm. Respectfully submitted, Jolynn Aanenson.

SHERWOOD MONTESSORI

1010 Cleveland
Chico, CA, 95928
(530) 345-6600
(530) 345-6620 fax

Via hand delivery

October 27, 2023

Superintendent Kelly Staley
Chico Unified School District
1163 E. Seventh Street
Chico, CA 95926

RE: Request for Proposition 39 Facilities for the 2024-25 School Year

Dear Superintendent Staley:

I am writing on behalf of Sherwood Montessori Charter School ("Charter School") to request reasonably equivalent school facilities from the Chico Unified School District ("District") pursuant to Education Code Section 47614 (i.e., Proposition 39) and Title 5 of the California Code of Regulations ("CCR") Section 11969.1 through 11969.11, as amended ("Implementing Regulations").

Proposition 39, passed by the voters of California on November 7, 2000, requires school districts to make available, to each charter school operating within the school district, school facilities sufficient for each charter school to accommodate all of the charter school's in-district students in conditions reasonably equivalent to those in which the students would be accommodated if they were attending other public schools of the school district. Facilities provided shall be contiguous, furnished, and equipped, and shall remain the property of the school district. In addition, the school district must make reasonable efforts to provide the charter school with facilities near to where the charter school desires to be located. (See Education Code Section 47614(b)).

The Proposition 39 Implementing Regulations, adopted by the State Board of Education ("SBE") in 2002, and amended in 2008, require the Charter School to make an annual written request for facilities. Title 5 CCR Section 11969.9(c)(1) specifies the information that must be included in the annual facilities request. This request, along with the information submitted herewith, meets and exceeds the requirements of Education Code Section 47614 and the Implementing Regulations.

**Projected Average Daily Attendance (ADA)**

In accordance with Education Code Section 47614(b)(2), the District is required to allocate school facilities to the Charter School for the following school year based upon a projection of average daily classroom attendance provided by the Charter School.

The Charter School's Board of Directors has determined that a reasonable projection of the Charter School's in-District average daily classroom attendance for the 2024-2025 school year is 119.35. The following is a breakdown of the Charter School's projected average daily attendance ("ADA") as required by 5 CCR Section 11969.9(c)(1). The Charter School's ADA figures are based on the methodology outlined in the following section.

Please note:

- "Prior year" means the fiscal year prior to the year in which a facilities request is made. For this request, the prior year is 2022-23.
- "Current year" means the fiscal year in which a facilities request is made. For this request, the current year is 2023-24.
- "Request year" means the fiscal year for which facilities are being requested. For this request, the request year is 2024-25.

**Table 1: Total ADA**

| Grade Level | Actual Total Prior Year (P-2) | Projected Total Current Year | Projected Total Request Year |
|---|---|---|---|
| Tk/K | 19.14 | 21.28 | 27.75 |
| 1 | 8.43 | 11.10 | 21.28 |
| 2 | 9.98 | 12.03 | 11.10 |
| 3 | 23.50 | 12.03 | 12.03 |
| 4 | 8.46 | 21.28 | 12.03 |
| 5 | 10.38 | 8.33 | 21.28 |
| 6 | 6.31 | 8.33 | 8.33 |
| 7 | 4.11 | 5.55 | 8.33 |
| 8 | 0.99 | 4.63 | 5.55 |
| **total** | **91.30** | **104.54** | **127.68** |

**Table 2: Total In-District ADA**

| Grade Level | Actual Total Prior Year (P-2) | Projected Total Current Year | Projected Total Request Year |
|---|---|---|---|
| TK/K | 19.25 | 19.43 | 27.75 |
| 1 | 8.43 | 10.18 | 19.43 |
| 2 | 8.17 | 11.10 | 10.18 |
| 3 | 22.55 | 10.18 | 11.10 |
| 4 | 8.46 | 20.35 | 10.18 |
| 5 | 9.45 | 8.33 | 20.35 |
| 6 | 6.31 | 6.48 | 8.33 |
| 7 | 4.11 | 5.55 | 6.48 |
| 8 | 0.99 | 4.63 | 5.55 |
| **total** | **87.72** | **96.21** | **119.35** |

**Table 3: Total Classroom ADA**

| Grade Level | Actual Total Prior Year (P-2) | Projected Total Current Year | Projected Total Request Year |
|---|---|---|---|
| Tk/K | 19.14 | 21.28 | 27.75 |
| 1 | 8.43 | 11.10 | 21.28 |
| 2 | 9.98 | 12.03 | 11.10 |
| 3 | 23.50 | 12.03 | 12.03 |
| 4 | 8.46 | 21.28 | 12.03 |
| 5 | 10.38 | 8.33 | 21.28 |
| 6 | 6.31 | 8.33 | 8.33 |
| 7 | 4.11 | 5.55 | 8.33 |
| 8 | 0.99 | 4.63 | 5.55 |
| **total** | **91.30** | **104.54** | **127.68** |

**Table 4: Total In-District Classroom ADA**

| Grade Level | Actual Total Prior Year (P-2) | Projected Total Current Year | Projected Total Request Year |
|---|---|---|---|
| Tk/K | 19.14 | 21.28 | 27.75 |
| 1 | 8.43 | 11.10 | 21.28 |
| 2 | 9.98 | 12.03 | 11.10 |
| 3 | 23.50 | 12.03 | 12.03 |
| 4 | 8.46 | 21.28 | 12.03 |
| 5 | 10.38 | 8.33 | 21.28 |
| 6 | 6.31 | 8.33 | 8.33 |
| 7 | 4.11 | 5.55 | 8.33 |
| 8 | 0.99 | 4.63 | 5.55 |
| **total** | **91.30** | **104.54** | **127.68** |

The following tables represent the projected **in-District ADA** (from Table 2 above) and **in-District classroom ADA** (from Table 4 above) broken down by grade level and the school in the District the pupils are otherwise eligible to attend. (5 CCR Section 11969.9(c)(2).)

**Methodology Used In Making ADA Projection:**

Title 5 CCR Section 11969.9(c)(1)(B) requires the facilities request to include a description of the methodology for the ADA projections. The Charter School utilized the following methodology in calculating the ADA projections:

| School Year | Enrollment | ADA Claimed at P-2 | Retention Rate from prior year | Growth Percentage Change | # of Wait Listed Children |
|---|---|---|---|---|---|
| **2010-11** | 89 | 87.52 | N/A | N/A | 140 |
| **20011-12** | 120 | 114.54 | 70% | 26% | 101 |

| | | | | | |
|---|---|---|---|---|---|
| **2012-13** | 140 | 134.26 | 94% | 14% | 106 |
| **2013-14** | 168 | 145.7 | 87% | 17% | 98 |
| **2014-15** | 146 | 137.63 | 90% | -13% | 113 |
| **2015-16** | 154 | 145.12 | 90% | 5% | 58 |
| **2016-17** | 138 | 136.038 | 65% | -10% | 115 |
| **2017-18** | 163 | 151.59 | 75% | 15% | 28 |
| **2018-19** | 157 | 150.03 | 79% | -3.75% | 39 |
| **2019-20** | 161 | 154.55 | 79%* | 2.52% | 3 |
| **2020-21** | 123 | 115.2 | 72% | -23.6% | 0 |
| **2021-22** | 110 | 101.46 | 80% | -10.56% | 0 |
| **2022-23** | 101 | 92.32 | 79% | -10.91% | 0 |
| **2023-24** | 113 | * | 83% | 11.88% | 0 |

*15 students moved out of the state due to the Camp Fire, including these students makes the # 72%

As demonstrated herein, we have analyzed our School's historical enrollment, retention, and growth trends, prior ADA figures, and historical wait list numbers in order to arrive at our total projected in-District classroom ADA figure for the request year. ADA numbers were based on an attendance rate of 92.51%

**Supporting Documentation**

Title 5 CCR Section 11969.9(c)(1)(C) requires the facilities request to include supporting documentation. The Implementing Regulations state that when a charter school is not yet open (i.e., not yet providing instruction) or to the extent an operating charter school projects a substantial increase in in-District ADA, the annual request must include documentation of the number of in-District students meaningfully interested in attending the Charter School. Please be advised that the Charter School is an existing school and does not project a significant increase in its in-District ADA. Accordingly, pursuant to the Implementing Regulations, please find attached our P-2 ADA forms for the prior year (2022-23) to support our projections and a roster of current year students by name, address, and phone number.

As you review the Charter School's ADA projections and supporting documentation, please keep in mind that the Proposition 39 regulations do not specify or require a particular type of supporting documentation to be used. Schools may submit any type of supporting documentation which they used to arrive at their ADA projections. This documentation must be "sufficient for the district to determine the reasonableness of the projection, but … **need not be verifiable for precise arithmetical accuracy**." (Section 11969.9(c)(1)(C); emphasis added.) The supporting documentation is intended only to demonstrate

reasonableness of Charter School's request, not mathematical exactitude. However, should the District desire additional documentation or information regarding the Charter School's ADA projections, please contact me as soon as possible. We remain willing to cooperate with the District to immediately address any questions or concerns about this request and the supporting documentation.

**Operational Calendar:**

Title 5 CCR Section 11969.9(c)(1)(D) requires the facilities request to include the Charter School's operational calendar. The Charter School's operational calendar is attached for your review. The Charter School's first day of instruction for the 2024-2025 school year will be Thursday, August 15th.

Please note that Title 5 CCR Section 11969.9(j) requires the District to ensure that a furnished and equipped facility meeting the requirement of Proposition 39 be made available to the Charter School no less than ten (10) working days prior to the charter school's first day of instruction. In addition, in accordance with Section
11969.5, the space allocated must be made available for the Charter School's entire school year regardless of the School District's instructional year or class schedule.

**Educational Program:**

Title 5 CCR Section 11969.9(c)(1)(F) requires the facilities request to provide information regarding the charter school's educational program that is relevant to the assignment of facilities. The Charter School's educational program does have unique facility's needs. Sherwood Montessori operates grade levels transitional kindergarten through eighth grade on one contiguous school site. In the Montessori approach to education, multiple-age classrooms give students opportunities for leadership, access to mentors, and occasions for community building. When a Montessori school spans age levels traditionally grouped in separate classrooms, these multiple age grouping relationships are replicated on a school wide scale. Consequently, the Charter School's educational program requires a single contiguous school site in which to operate.

**Facility Location:**

Title 5 CCR Section 11969.9(c)(1)(E) requires the Charter School to provide information regarding the District school site and/or general geographic area in which the Charter School wishes to locate. Based upon the needs of the Charter School and the residency of the projected student enrollment and based upon the investment in time and money to improve the facilities currently housing the Charter School, the Charter School desires to locate in its current facility on the Chapman Elementary campus.

**Procedures and Timelines:**

In accordance with the Implementing Regulations, the District is required to review the Charter School's attendance projections and to express any objections that it has about the Charter School's attendance projections in writing on or before December 1, 2023. The Charter School must respond to the District's written objections, if any, on or before January 2, 2024, and will either reaffirm or modify its projections as it deems necessary. (5 CCR Section 11969.9(d).)

Furthermore, we look forward to receiving a written preliminary facilities proposal from the District on or before February 1, 2024, as required under the Implementing Regulations. (5 CCR Section 11969.9(f).)

The preliminary proposal must include, at a minimum, the following information: (1) a breakdown of the number of teaching stations (classrooms), specialized and non-classroom based space to be allocated to the Charter School, with an indication as to whether the space is exclusive or shared use; (2) the projections of in-District classroom ADA on which the proposal is based; (3) the specific location of the space; (4) all conditions pertaining to the space, including a draft of any proposed agreement pertaining to the Charter School's use of the space, (typically referred to as a facilities use agreement); (5) the projected pro rata share amount and a description of the methodology used to determine that amount; and (6) a list and description of the comparison group schools used in developing its preliminary proposal, and a description of the differences between the preliminary proposal and the Charter School's facilities request. In accordance with the Implementing Regulations (5 CCR Section 11969.2(d)), if the District's preliminary proposal (or final notification) does not accommodate Charter School at a single school site, the District's governing board must first make a finding that the Charter School could not be accommodated at a single site and adopt a written statement of reasons explaining the finding. The Charter School has until March 1, 2024, to respond to the preliminary proposal, expressing any concerns, addressing differences between the preliminary proposal and the facilities request, and/or making counter proposals.

The Implementing Regulations Section 11969.9(h) requires the District to provide a written final notification regarding the space to be allocated to the Charter School prior to April 1, 2024. The final notification specifically must include, at a minimum, the following:

(1) The teaching station, specialized classroom space, and non-teaching station space offered for the exclusive use of the charter school and the teaching station, specialized classroom space, and non-teaching station space which the charter is to be provided access on a shared basis with District operated programs, if any;
(2) For shared space, if any, the proposed arrangements for sharing;
(3) The in-District classroom ADA assumptions for the Charter School upon which the allocation is based and, if the assumptions are different than those submitted by the charter school, a written explanation of the reasons for the differences;
(4) The specific location of the space;
(5) All conditions pertaining to the Charter School's use of the space;
(6) The pro rata share amount and a description of the methodology used to determine that amount;
(7) The payment schedule for the pro rata share amount, which shall take into account the timing of revenues from the state and from local property taxes; and
(8) A response to the Charter School's concerns and/or counter-proposals, if any.

A California Court of Appeals decision has made clear that, in meeting their Proposition 39 obligation, school districts must give the same degree of consideration to the needs of charter school students as it does to the students in district-run schools. The court noted that "accommodating a charter school might involve moving district-operated programs or changing attendance areas" and that providing a contiguous school facility to a charter school might require disruption and dislocation among district students, staff and programs. *Ridgecrest Charter School v. Sierra Sands Unified School District*, 130 Cal.App.4th 986 (2005). In addition, the Court concluded that a school district responding to a request for facilities must issue a statement of reasons at the time it makes its final determination that is "thorough" and "factual" enough to

permit “effective review by the courts”; the statement of reasons issued by the school district must demonstrate that the district has “adequately considered all relevant factors” and that the district can “demonstrate a rational connection between those factors, the choice made, and the purposes of [Proposition 39].” Furthermore, as the District may be aware, two recent court cases clarified the manner in which a school district must allocate facilities to a charter school. Specifically, *Bullis Charter School v. Los Altos School District* (200 Cal.App.4th 1022), among other things, requires the District to perform a calculation of the square footage of all of the specialized and non-teaching station spaces at the comparison schools. The District must base its allocation of space to the Charter School on this analysis. In addition, the California Supreme Court has agreed to review whether a school district may use its internal "norming ratios", or student-teacher ratios, in determining the number of classrooms to offer to charter schools instead of using the facilities inventory at comparison group schools required by the Implementing Regulations. (*California Charter Schools Assn. v. Los Angeles Unified School District* (154 Cal.Rptr.3d 889 2013)).

Although Proposition 39 requires the District to allocate a school facility for Charter School use, the Charter School is amenable to discussing alternative facilities arrangements that meet both the needs of the District and the Charter School.

The Charter School Board of Directors has delegated to me the responsibility to negotiate the allocation of a facility under Proposition 39. All communications regarding this matter should be sent to my attention at the address below. My contact information is as follows:

Michelle Yezbick
1010 Cleveland, Chico, CA 95928
Phone: (530) 345-6600
Cell: (530) 966-8513
Fax: (530) 345-6620
michelle@sherwoodmontessori.org

I appreciate your time and consideration of this request and I look forward to developing a mutually agreeable plan to meet the facilities needs of the Charter School’s in-District students. I acknowledge that the cooperative and professional approach that Chico Unified School District has taken in working with area charter schools takes time and resources and I applaud the District for being a model for other districts in California.

Sincerely,

Michelle Yezbick

School Director, Sherwood Montessori

cc: Sherwood Montessori Board Members:
Dr. Russell Shapiro
Tina Hanson-Lewis
Kati Boomgarden

Samantha Lawson

Sarah Kohlmann, Legal Counsel
Tina Keene, Director, State and Federal Programs, Chico Unified School District
Julie Kistle, Facilities, Director, Chico Unified School District

Attachments (the following attachments are incorporated by reference herein): Prior year P2 ADA forms, roster of current year students, operational calendar

use months 1-8

# Sherwood Montessori Monthly Attendance Report

Table 1



**MONTH1 - Beginning: 08/15/2022, MONTH8 - Ending: 03/24/2023**

**Sherwood Montessori - Only All Students**

**Days Taught: 134**

| Section Id | Teacher | Enrolled Last Day Prev Mon | Last Day Drops | First Day Adds | Begin Count | Add | Drop | Last Day Count | 1st Day Next Month | Max. Enroll. | Days Not Enroll | Days of Absence | Actual Attend | % of Actual Attend | I. S. Credit | I. S. No Credit | I.S. Pend | Total For School | % of Total Attend | ADA Total / Days Taught |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Grade0K-A | Shippen | 0 | | 0 | 11 | 0 | 1 | 10 | 10 | 11 | 90 | 82 | 1,289 | 93.13 | 2 | 11 | 0 | 1,291 | 93.28 | 9.634 |
| Grade0K-B | Mankoski | 0 | | 0 | 5 | 3 | 5 | 3 | 3 | 8 | 413 | 133 | 526 | 79.81 | 0 | 0 | 0 | 526 | 79.81 | 3.925 |
| **Grade 00K** | | 0 | | 0 | 16 | 3 | 6 | 13 | 13 | 19 | 503 | 215 | 1,815 | 88.83 | 2 | 11 | 0 | 1,817 | 88.93 | 13.559 |
| Grade0TK-A | Shippen | 0 | | 0 | 3 | 0 | 1 | 2 | 2 | 3 | 59 | 26 | 317 | 92.41 | 0 | 0 | 0 | 317 | 92.41 | 2.365 |
| Grade0TK-B | Mankoski | 0 | | 0 | 4 | 4 | 1 | 7 | 7 | 8 | 470 | 37 | 565 | 93.85 | 0 | 0 | 0 | 565 | 93.85 | 4.216 |
| **Grade 00TK** | | 0 | | 0 | 7 | 4 | 2 | 9 | 9 | 11 | 529 | 63 | 882 | 93.33 | 0 | 0 | 0 | 882 | 93.33 | 6.582 |
| Grade1-A | Powers | 0 | | 0 | 2 | 1 | 2 | 1 | 1 | 3 | 233 | 16 | 153 | 90.53 | 0 | 0 | 0 | 153 | 90.53 | 1.141 |
| Grade1B | Adams | 0 | | 0 | 3 | 2 | 1 | 4 | 4 | 5 | 150 | 44 | 468 | 90.00 | 3 | 5 | 0 | 471 | 90.57 | 3.514 |
| Grade1C | Knox | 0 | | 0 | 4 | 1 | 0 | 5 | 5 | 5 | 115 | 48 | 503 | 90.63 | 3 | 1 | 0 | 506 | 91.17 | 3.776 |
| **Grade 01** | | 0 | | 0 | 9 | 4 | 3 | 10 | 10 | 13 | 498 | 108 | 1,124 | 90.35 | 6 | 6 | 0 | 1,130 | 90.83 | 8.432 |
| Grade2-A | Powers | 0 | | 0 | 4 | 0 | 1 | 3 | 3 | 4 | 47 | 36 | 448 | 91.61 | 5 | 0 | 0 | 453 | 92.63 | 3.380 |
| Grade2B | Adams | 0 | | 0 | 3 | 1 | 0 | 4 | 4 | 4 | 115 | 26 | 395 | 93.82 | 0 | 0 | 0 | 395 | 93.82 | 2.947 |
| Grade2C | Knox | 0 | | 0 | 3 | 2 | 1 | 4 | 4 | 5 | 143 | 31 | 490 | 92.97 | 0 | 6 | 0 | 490 | 92.97 | 3.656 |
| **Grade 02** | | 0 | | 0 | 10 | 3 | 2 | 11 | 11 | 13 | 305 | 93 | 1,333 | 92.76 | 5 | 6 | 0 | 1,338 | 93.11 | 9.985 |
| Grade3-A | Powers | 0 | | 0 | 8 | 3 | 1 | 10 | 10 | 11 | 202 | 140 | 1,114 | 87.57 | 8 | 10 | 0 | 1,122 | 88.20 | 8.373 |
| Grade3B | Adams | 0 | | 0 | 8 | 1 | 2 | 7 | 7 | 9 | 182 | 54 | 958 | 93.55 | 12 | 0 | 0 | 970 | 94.72 | 7.238 |
| Grade3C | Knox | 0 | | 0 | 7 | 2 | 0 | 9 | 9 | 9 | 98 | 51 | 1,057 | 95.39 | 0 | 0 | 0 | 1,057 | 95.39 | 7.888 |
| **Grade 03** | | 0 | | 0 | 23 | 6 | 3 | 26 | 26 | 29 | 482 | 245 | 3,129 | 91.92 | 20 | 10 | 0 | 3,149 | 92.50 | 23.500 |
| **Sub Total** | **GRADES 0K-3** | 0 | | 0 | 65 | 20 | 16 | 69 | 69 | 85 | 2,317 | 724 | 8,283 | 91.29 | 33 | 33 | 0 | 8,316 | 91.65 | 62.059 |

19.1

# Sherwood Montessori Monthly Attendance Report



## MONTH1 - Beginning: 08/15/2022, MONTH8 - Ending: 03/24/2023

**Sherwood Montessori - Only All Students**

**Days Taught: 134**

| Section Id | Teacher | Enrolled Last Day Prev Mon | Last Day Drops | First Day Adds | Begin Count | Add | Drop | Last Day Count | 1st Day Next Month | Max. Enroll. | Days Not Enroll | Days of Absence | Actual Attend | % of Actual Attend | I. S. Credit | I. S. No Credit | I.S. Pend | Total For School | % of Total Attend | ADA Total / Days Taught |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Grade4-A | Lusardi | 0 | | 0 | 5 | 0 | 1 | 4 | 4 | 5 | 115 | 48 | 490 | 88.28 | 6 | 11 | 0 | 496 | 89.36 | 3.701 |
| Grade4-B | Pearce | 0 | | 0 | 5 | 0 | 0 | 5 | 5 | 5 | 0 | 32 | 619 | 92.38 | 19 | 0 | 0 | 638 | 95.22 | 4.761 |
| **Grade 04** | | 0 | | 0 | 10 | 0 | 1 | 9 | 9 | 10 | 115 | 80 | 1,109 | 90.53 | 25 | 11 | 0 | 1,134 | 92.57 | 8.462 |
| Grade5-A | Lusardi | 0 | | 0 | 7 | 0 | 1 | 6 | 6 | 7 | 7 | 43 | 875 | 93.98 | 13 | 0 | 0 | 888 | 95.38 | 6.626 |
| Grade5-B | Pearce | 0 | | 0 | 4 | 1 | 0 | 5 | 5 | 5 | 127 | 34 | 491 | 90.42 | 12 | 6 | 0 | 503 | 92.63 | 3.753 |
| **Grade 05** | | 0 | | 0 | 11 | 1 | 1 | 11 | 11 | 12 | 134 | 77 | 1,366 | 92.67 | 25 | 6 | 0 | 1,391 | 94.36 | 10.380 |
| Grade6-A | Lusardi | 0 | | 0 | 2 | 0 | 1 | 1 | 1 | 2 | 51 | 7 | 210 | 96.77 | 0 | 0 | 0 | 210 | 96.77 | 1.567 |
| Grade6-B | Pearce | 0 | | 0 | 5 | 0 | 0 | 5 | 5 | 5 | 0 | 32 | 630 | 94.02 | 6 | 2 | 0 | 636 | 94.92 | 4.746 |
| **Grade 06** | | 0 | | 0 | 7 | 0 | 1 | 6 | 6 | 7 | 51 | 39 | 840 | 94.70 | 6 | 2 | 0 | 846 | 95.37 | 6.313 |
| **Sub Total** | **GRADES 4-6** | 0 | | 0 | 28 | 1 | 3 | 26 | 26 | 29 | 300 | 196 | 3,315 | 92.44 | 56 | 19 | 0 | 3,371 | 94.00 | 25.156 |
| Grade7-A | Whittemore | 0 | | 0 | 4 | 1 | 0 | 5 | 5 | 5 | 90 | 25 | 544 | 93.79 | 8 | 3 | 0 | 552 | 95.17 | 4.119 |
| **Grade 07** | | 0 | | 0 | 4 | 1 | 0 | 5 | 5 | 5 | 90 | 25 | 544 | 93.79 | 8 | 3 | 0 | 552 | 95.17 | 4.119 |
| Grade8-A | Whittemore | 0 | | 0 | 1 | 0 | 0 | 1 | 1 | 1 | 0 | 1 | 129 | 96.26 | 4 | 0 | 0 | 133 | 99.25 | 0.992 |
| **Grade 08** | | 0 | | 0 | 1 | 0 | 0 | 1 | 1 | 1 | 0 | 1 | 129 | 96.26 | 4 | 0 | 0 | 133 | 99.25 | 0.992 |
| **Sub Total** | **GRADES 7-8** | 0 | | 0 | 5 | 1 | 0 | 6 | 6 | 6 | 90 | 26 | 673 | 94.25 | 12 | 3 | 0 | 685 | 95.93 | 5.111 |
| IS-0K-A | Shippen | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Grade 00K** | | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |

# Sherwood Montessori Monthly Attendance Report



## MONTH1 - Beginning: 08/15/2022, MONTH8 - Ending: 03/24/2023

**Sherwood Montessori - Only All Students**

**Days Taught: 134**

| Section Id | Teacher | Enrolled Last Day Prev Mon | Last Day Drops | First Day Adds | Begin Count | Add | Drop | Last Day Count | 1st Day Next Month | Max. Enroll. | Days Not Enroll | Days of Absence | Actual Attend | % of Actual Attend | I. S. Credit | I. S. No Credit | I.S. Pend | Total For School | % of Total Attend | ADA Total / Days Taught |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| IS-01-A | Powers | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-01-B | Knox | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-01-C | Adams | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Grade 01** | | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-02-A | Powers | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-02-B | Knox | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-02-C | Adams | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Grade 02** | | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-03-A | Knox | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-03-B | Adams | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Grade 03** | | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Sub Total** | **IS-0K-3** | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-04-A | Lusardi | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-04-B | Pearce | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Grade 04** | | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-05-A | Lusardi | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-05-B | Pearce | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Grade 05** | | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |

# Sherwood Montessori Monthly Attendance Report



**MONTH1 - Beginning: 08/15/2022, MONTH8 - Ending: 03/24/2023**

**Sherwood Montessori - Only All Students**

**Days Taught: 134**

| Section Id | Teacher | Enrolled Last Day Prev Mon | Last Day Drops | First Day Adds | Begin Count | Add | Drop | Last Day Count | 1st Day Next Month | Max. Enroll. | Days Not Enroll | Days of Absence | Actual Attend | % of Actual Attend | I. S. Credit | I. S. No Credit | I.S. Pend | Total For School | % of Total Attend | ADA Total / Days Taught |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| IS-06-A | Lusardi | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-06-B | Pearce | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Grade 06** | | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Sub Total** | **IS-4-6** | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-07-A | Whittemore | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Grade 07** | | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-08-A | Whittemore | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Grade 08** | | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Sub Total** | **IS-7-8** | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| IS-TK-A | Shippen | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Grade 00TK** | | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **Sub Total** | **IS-TK** | 0 | | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0.00 | 0.000 |
| **School Totals:** | | 0 | | 0 | 98 | 22 | 19 | 101 | 101 | 120 | 2,707 | 946 | 12,271 | 91.75 | 101 | 55 | 0 | 12,372 | 92.51 | 92.328 |

**Signature**_____ **Date**_____

*To the best of my knowledge and belief this State School Register report has been kept as required by law and in accordance with the instruction of the Superintendent of Public Instruction.*

# Name of School

## 2024-2025 School Calendar

### July 2024

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | | | |

### August 2024

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

### September 2024

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | | | | | |

### October 2024

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | | |

### November 2024

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |

### December 2024

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | | | | |

### January 2025

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | |

### February 2025

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | |

### March 2025

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | | | | | |

### April 2025

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | | | |

### May 2025

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

### June 2025

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | | | | | |

School Closed
Early Release Day
Parent Teacher Conferences
Employee Planning (no school for students)
Report Cards
First and Last Day of School

| | |
|---|---|
| Aug 12-14 | Planning/Development Days |
| Aug15 | First Day of School for students |
| Sep 2 | Labor Day-Closed |
| Oct 14-18 | Parent/Teacher conferences Dismissal 1:35 p.m. |
| Nov 11 | Veterans Day-Closed |
| Nov 25-29 | Thanksgiving Break |
| Dec 20 | Report Cards |
| Dec 23-Jan 6 | Winter Break |

| | |
|---|---|
| Jan 20 | Dr. Martin Luther King Jr Day-Closed |
| Feb 14 | Lincoln's Birthday-Closed |
| Feb 17 | Presidents' Day-Closed |
| Mar 17-21 | Spring Break |
| Apr 7-11 | Parent/Teacher conferences Dismissal 1:35 p.m. |
| Apr 18-21 | Spring Travel Days |
| May 26 | Memorial Day-Closed |
| Jun 3 | Last Day of School/ Report Cards |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

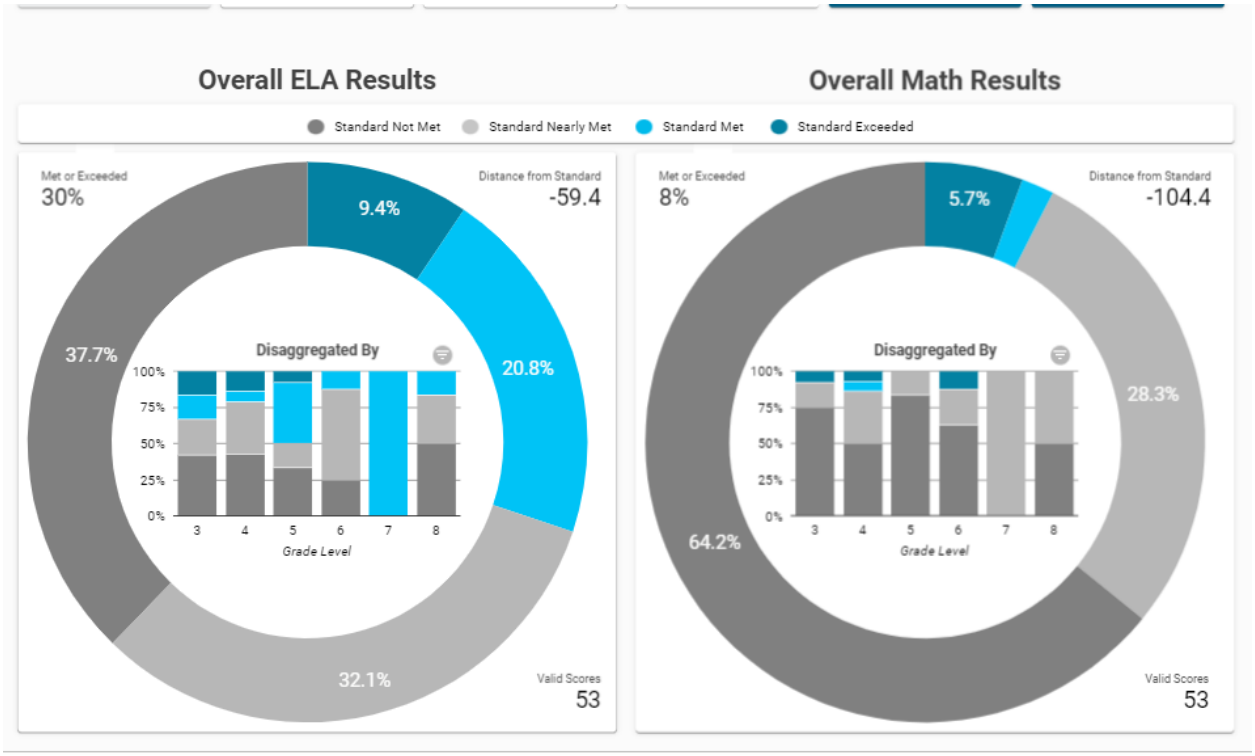
**Date:** October 19, 2023

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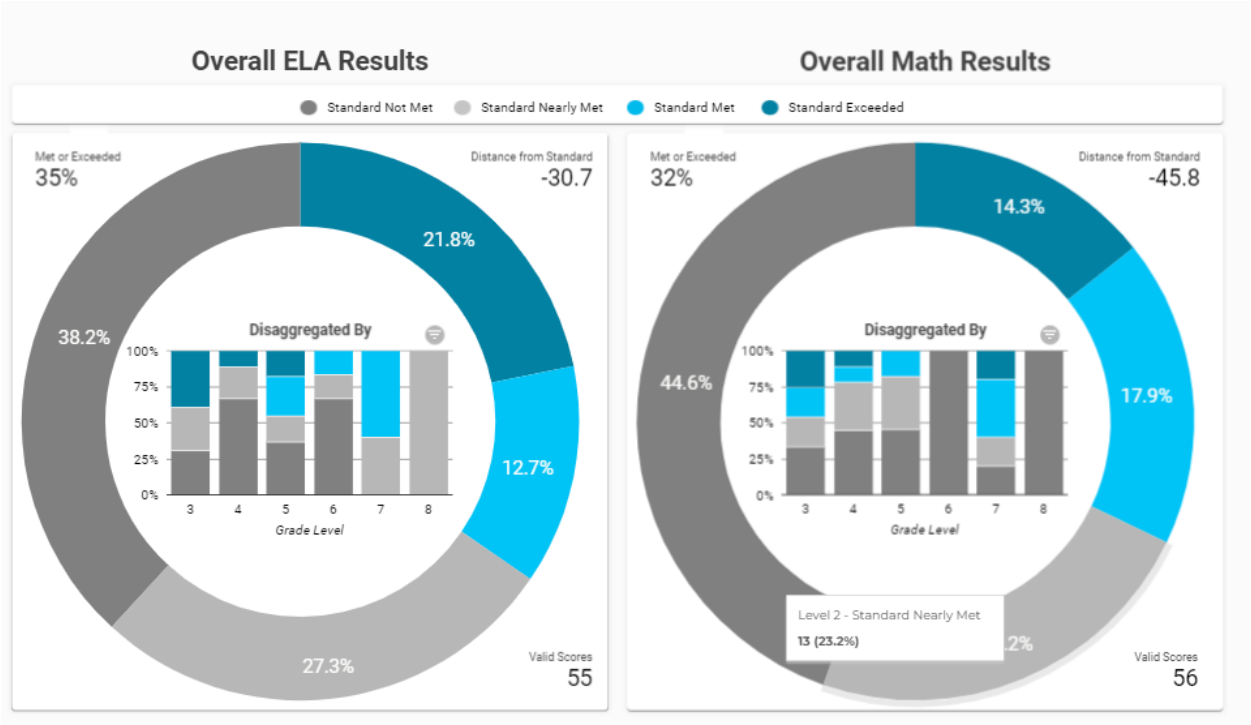
**Administrative**

- Updated enrollment will be reported at the meeting.
- We have two positions we are hiring for currently, in addition to seeking more substitute classified and credentialed staff. We are looking for a new Learning Center Aide and a Reading Intervention Instructor.
- A recently published meta-analysis of existing research finds that *"Montessori education has a meaningful and positive impact on child outcomes, both academic and nonacademic, relative to outcomes seen when using traditional educational methods."* Randolph, J. J., Bryson, A., Menon,L., Henderson, D. K., Kureethara Manuel, A., Michaels, S., rosenstein, d. l. w., McPherson,W.,O'Grady,R.,&Lillard,A. S. (2023). Montessori education's impact on academic and nonacademic outcomes: A systematic review. Campbell Systematic Reviews, 19, e1330. https://onlinelibrary.wiley.com/doi/10.1002/cl2.1330
- Although the CDE has not yet updated public access to assessment data, our Parsec dashboard shows a significant increase in students' outcomes as measured by the CAASPP (California Assessment of Student Performance and Progress) summative, standardized test. Data on the next page show an increase in the percentage of 3rd-8th graders meeting and exceeding standards in both math and ELA, with math results showing the greatest increase.

2021-2022

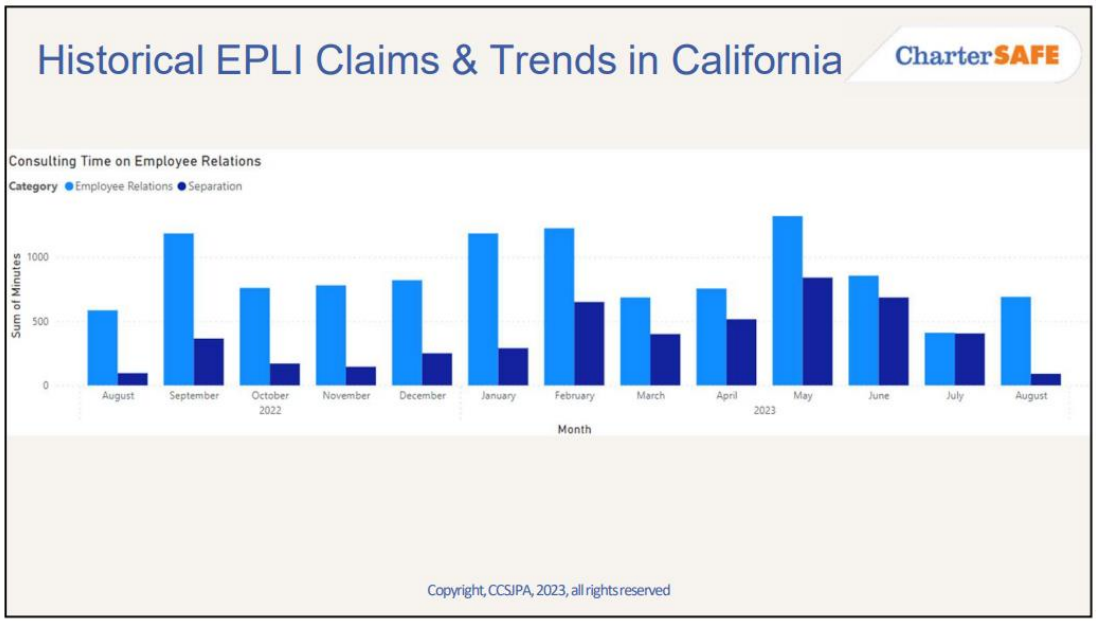



2022-2023



**Safety**

- We have been added to the Catapult emergency system schoolwide at the urging of Chico Police Department. Previously, Chapman had added only the School Director and all communication went through walkie talkies.
- Heather Fisher, my Administrative Assistant, and I attended the Charter Safe Summit for Northern California on October 10th. Our learning was focused on human resources as there have been increasing claims in this area across the country and across industry.
  Data specific to charter schools show that human resources expertise is being requested by school administration not just toward the end of the school year for support with non-renewals, but also at the start of the school year as educators struggle with job-related stress.




**Legislative**

- AB 1604 (Bonta) which would have created red tape that would drive up interest rates for the charter schools, introduce new requirements in operations, and create obstacles for them to obtain facilities was vetoed by Governor Gavin Newsom.

**Community & Promotion**

- Anne Adams, lower elementary teacher, and I attended the Kai Music Festival and promoted the school on Saturday, September 23rd.
- We had a well-attended and very fun International Fall Festival on Friday, September 29th.
- Stacy, our middle school teacher, has organized a Sherwood Book Faire at Barnes & Noble on October 28th and 29th. This will be both a fundraiser and a promotion event for the school.
- Stacy has also arranged two field trips for the middle school to local restaurants. The restaurants will donate lunch and the students will use persuasive writing skills to write reviews for the food. Press releases have been sent out and we are hoping the local news may show up and cover the project.

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

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

**Date:** October 19, 2023, Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of September 2023 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 750,804.63 as of September 30,2023 for the checking account.
- The expenses in September were for the normal operating cost.

Profit & Loss

The September 2023 Profit & Loss report shows a Net Income of $ -208,124, which was offset by $ 48,818 LCF, $71,776 EPA funds deposited in October 2023 along with $ 8,211 of State ELOP funds. The actual Net Income was $ -79,319. August net income was -$ 16,503.

- Cash Flow
  The school is projected to end the year with a positive cash balance assuming the final ADA is greater than 95. Current average enrollment is 113 with an average absence rate of 8 per day projected to be 105 ADA.

# Sherwood Montessori
## Profit & Loss YTD Comparison
July through September 2023

| | Jul - Sep 23 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | 167,763 |
| **Total Income** | 167,763 |
| **Gross Profit** | 167,763 |
| **Expense** | |
| **1000 Certificated Salaries** | 99,577 |
| **2000 Classified Salaries** | 86,886 |
| **3000-Employee Benefits** | 82,534 |
| **4000-Books and Supplies** | 15,920 |
| **5000 Services/Other Op. Exp.** | 90,971 |
| **Total Expense** | 375,887 |
| **Net Ordinary Income** | -208,124 |
| **Net Income** | **-208,124** |

**Sherwood Montessori**
**Board of Directors - Vendor Payments Report**
**September 2023**

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 09/01/2023 | ACH | CharterSAFE | BILLED PREMIUM - LIABILI... | 5400-Liability Insurance | 3,129.00 |
| Check | 09/01/2023 | ACH | CharterSAFE | BILLED PREMIUM - WC 20... | 3601-Workers Comp | 1,488.00 |
| Check | 09/01/2023 | 9733 | RTI, Inc. | INV293,919,803 CUST 14-S... | Ethernet - Fiberoptic | 1,901.96 |
| Check | 09/01/2023 | DBT | Facebook Ads | JOB AD | Advertising | 50.00 |
| Check | 09/01/2023 | DBT | Creative Composition | TK-K BANNER | Advertising | 292.05 |
| Check | 09/01/2023 | DBT | Macquarie Equipment Capit... | Kyocera Copier Lease 2023 ... | Copier Lease | 223.00 |
| Check | 09/05/2023 | 7496 | GENAVIEVE CHAMBERS | LIVESCAN | LiveScan and TB Test Servi... | 66.00 |
| Check | 09/05/2023 | 7497 | CHICO IMMEDIATE CARE | BRIANA VALDEZ ACC 82A9... | 3903-Other Employee Benefits | 356.11 |
| Check | 09/05/2023 | EFT | Comcast 4454 | SERVICE - 2023 AUG-SEP | Internet Service Provider | 248.97 |
| Check | 09/05/2023 | 9734 | IT Management Corp | INV 7007-PART 3 | Computers and Electronics | 2,806.88 |
| Check | 09/06/2023 | ACH | Finch & Sparrow | SPEECH THERAPIST $90 X... | Contracted Service | 2,160.00 |
| Check | 09/06/2023 | | Hernandez Cleaning Service | SERVICE - 2023 AUG | Housekeeping Services | 2,990.00 |
| Check | 09/06/2023 | | ParentSquare | 2023-24 Subscription | Contracted Service | 2,750.00 |
| Check | 09/06/2023 | | Waste Management | SERVICE 2023 AUG | Trash/Recycling | 140.44 |
| Check | 09/06/2023 | DBT | HP LEASE 7603 | Lease Payment - Customer I... | HP DIRECT LEASE | 319.17 |
| Check | 09/06/2023 | DBT | Trites Backflow Service | BACKFLOW SERVICE CHE... | Contracted Service | 50.00 |
| Check | 09/06/2023 | DBT | Amazon.com | SUPPLIES | Instructional Supplies | 218.17 |
| Check | 09/06/2023 | DBT | Amazon.com | | Instructional Supplies | 108.24 |
| Check | 09/07/2023 | DBT | Costco | SNACKS - EXTENDED LEA... | Instructional Supplies | 370.70 |
| Check | 09/07/2023 | 9731 | Comcast Ethernet | SERVICE - 2023 AUG | Ethernet - Fiberoptic | 2,538.43 |
| Check | 09/08/2023 | 9737 | Hernandez Cleaning Service | BOUGH MATERIALS-FIXED... | Housekeeping Services | 669.37 |
| Check | 09/08/2023 | DBT | Amazon.com | | Instructional Supplies | 184.00 |
| Check | 09/08/2023 | DBT | Amazon.com | RECHARGEABLE AA - TO ... | Office Supplies | 37.57 |
| Check | 09/08/2023 | DBT | Amazon.com | VISITOR LOG BOOK, BAD... | Office Supplies | 97.32 |
| Check | 09/08/2023 | ACH | CharterSAFE | AUDIT 2022/23 - INV 43676 | 3601-Workers Comp | 5,135.54 |
| Check | 09/09/2023 | DBT | Facebook Ads | JOB AD | Advertising | 2.05 |
| Check | 09/09/2023 | DBT | USPS | MAILING | Postage | 28.93 |
| Check | 09/12/2023 | DBT | Craigslist | JOB AD | Advertising | 20.00 |
| Check | 09/12/2023 | DBT | Western Psychological Ser... | ABAS TEACHER FORM | Instructional Supplies | 276.25 |
| Check | 09/13/2023 | 9738 | Advanced Document | SERVICE - 2023 AUG | Copier Lease | 405.84 |
| Check | 09/13/2023 | 9741 | Barney James Kerr | 20.00 MATERIALS 198 HOU... | Contracted Service | 218.00 |
| Check | 09/13/2023 | 9739 | City of Chico | SERVICE - 2023 AUG | Sewer | 28.87 |
| Check | 09/13/2023 | 9740 | JUNK KING | Junk removal | Contracted Service | 178.00 |
| Check | 09/13/2023 | EFT | PG & E | SERVICE 2023 AUG | Electricity | 882.45 |
| Check | 09/13/2023 | DBT | Amazon.com | STAINLESS STEEL FLATW... | Instructional Supplies | 42.84 |
| Check | 09/13/2023 | DBT | Raley's | EXTENDED DAY | Instructional Supplies | 4.98 |
| Check | 09/13/2023 | EFT | Teresa Shippen | ALLISON MONTESSORI & ... | Instructional Supplies | 489.55 |
| Check | 09/14/2023 | DBT | Amazon.com | 2 WALKIE TALKIES | Office Supplies | 627.82 |
| Check | 09/14/2023 | ACH | COSTCO VISA CARD | THRU 15TH PURCHASES 2... | SHERWOOD COSTCO VISA | 181.39 |
| Check | 09/15/2023 | DBT | Amazon.com | BANDAGES | Office Supplies | 16.23 |
| Check | 09/15/2023 | ACH | Finch & Sparrow | SPEECH THERAPIST $90 X... | Contracted Service | 2,970.00 |
| Check | 09/18/2023 | 7498 | Gisel Montoya | LIVESCAN REIMB | LiveScan and TB Test Servi... | 66.00 |
| Check | 09/18/2023 | DBT | Wufoo | SERVICE - 2023 SEP | Online List Management | 19.00 |
| Check | 09/18/2023 | DBT | USPS | MAILING | Postage | 4.14 |
| Check | 09/18/2023 | DBT | Johnny's Chico Lock and S... | KEYS | Office Supplies | 18.01 |
| Check | 09/18/2023 | DBT | Office Depot | SUPPLIES | Instructional Supplies | 258.90 |
| Check | 09/18/2023 | EFT | Directional Ad-Vantage Hol... | CHICO MALL KIOSK | Advertising | 295.00 |
| Check | 09/19/2023 | DBT | Raley's | SNACKS | Food (Instructional) | 8.58 |
| Check | 09/19/2023 | DBT | Scholastic | BOOKS 7/8 | Instructional Supplies | 59.32 |
| Check | 09/20/2023 | DBT | UPGRADED LIVING MAG... | AD IN UPGRADED LIVING ... | Advertising | 200.00 |
| Check | 09/20/2023 | DBT | Costco | SNACKS | Instructional Supplies | 437.13 |
| Check | 09/20/2023 | DBT | TEA BAR CAFE | PBIS MEETING | Food - Meetings | 83.51 |
| Check | 09/21/2023 | DBT | Amazon.com | SOCCAR BALL PUMP & EQ... | Office Supplies | 188.33 |
| Check | 09/21/2023 | DBT | Scholastic | | 4100-Textbooks/Core Curric... | 59.32 |
| Check | 09/21/2023 | DBT | HP LEASE 7603 | Lease Payment - Customer I... | HP DIRECT LEASE | 319.17 |
| Check | 09/21/2023 | DBT | University of Oregon PBIS ... | PBIS APPS | Software Licensing | 350.00 |
| Check | 09/22/2023 | DBT | EDUCATION.COM | ANNUAL SUBSCRIPTION | 5300-Dues and Membership | 119.88 |
| Check | 09/22/2023 | DBT | Amazon.com | PRIME MO DUES | 5300-Dues and Membership | 188.33 |
| Check | 09/22/2023 | DBT | Amazon.com | SOCCER CONES | PE | 95.88 |
| Check | 09/22/2023 | DBT | Amazon.com | FOLDING OUTDOOR UTILI... | PE | 96.78 |
| Check | 09/22/2023 | DBT | TEA BAR CAFE | PBIS | Food - Meetings | 83.51 |
| Check | 09/22/2023 | DBT | UPS Store | MAILING | Postage | 10.21 |
| Check | 09/22/2023 | DBT | Amazon.com | INK REFILLS FOR ERASEA... | Office Supplies | 16.86 |
| Check | 09/23/2023 | DBT | Verizon Wireless | SERVICE 2023 SEP | Telephone, Cellular | 94.47 |
| Check | 09/24/2023 | DBT | WAGEWORKS INC | JOB AD | Advertising | 100.00 |
| Check | 09/24/2023 | DBT | Trader Joe's | HONEY FOR MIDDLE SCH... | Instructional Supplies | 7.49 |
| Check | 09/24/2023 | DBT | Facebook Ads | JOB AD | Advertising | 8.51 |
| Check | 09/25/2023 | DBT | Amazon.com | PRIME FEE | 5300-Dues and Membership | 16.23 |
| Check | 09/26/2023 | EFT | Comcast Business 9110 | SERVICE - 2023 SEP-OCT | Telephone, Landline | 182.69 |
| Check | 09/26/2023 | 9742 | Comcast Ethernet | SERVICE - 2023 SEP | Ethernet - Fiberoptic | 2,539.64 |

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 09/26/2023 | 9743 | Andrew Bays | MAINTENANCE HOURS | Contracted Service | 1,876.00 |
| Check | 09/26/2023 | DBT | Amazon.com | SOCCER BALL AND PUMP | PE | 54.11 |
| Check | 09/28/2023 | 7510 | Stacy .Gertz | Food | Instructional Supplies | 19.87 |
| Check | 09/28/2023 | 7511 | Kim Miller | LIVESCAN | LiveScan and TB Test Servi... | 64.00 |
| Check | 09/28/2023 | | Chico Country Day | NATALIE WREN - NURSE -I... | Contracted Service | 1,298.71 |
| Check | 09/28/2023 | | Chico Country Day | NATALIE WREN - NURSE -I... | Contracted Service | 1,298.71 |
| Check | 09/28/2023 | | Patrick Bossetti | INSTALLED HARDWARE | Contracted Service | 868.00 |
| Check | 09/28/2023 | | Kimberly Fellner | SUPPLIES | Food (Instructional) | 19.30 |
| Check | 09/28/2023 | | RTI, Inc. | CUST 14-SHERWOOD - IN... | Ethernet - Fiberoptic | 129.90 |
| Check | 09/28/2023 | | PARK AVENUE PEST CO... | SERVICE 2023 SEP - INV 001 | Pest Control | 85.00 |
| Check | 09/29/2023 | DBT | FoodMaxx | POPSICLES | Food (Instructional) | 42.13 |
| Check | 09/29/2023 | DBT | Office Depot | SUPPLIES | Office Supplies | 336.74 |
| Check | 09/29/2023 | DBT | Michaels | FACEPAINT | Instructional Supplies | 55.18 |
| Check | 09/29/2023 | DBT | Amazon.com | TWO POCKET FOLDERS 1... | Office Supplies | 56.28 |
| **TOTAL** | | | | | | **46,834.94** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Policy Revision**

**Date:** October 19, 2023

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**SUMMARY**

Revision of policy is needed to bring consistency among different documents.

**DISCUSSION**

Our Family Handbook, Parent Participation Policy, Visitation Policy, and Parent Complaint Policy state different guidelines for parents observing and volunteering in classrooms. The suggested revisions would bring all policies into alignment.

**ACTION REQUESTED**

Approve suggested revisions.

Attachments: Redline versions of Parent Participation Policy, Visitation Policy, Parent Complaint Policy, and the Volunteering section of the Family Handbook

SHERWOOD MONTESSORI

# Parent Participation Policy

Sherwood Montessori is a community-based, child-centered Montessori school that 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.

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 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 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

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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.

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.

**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. Visits during school hours should first be arranged with the teacher, at least three days in advance, and after the first six to eight weeks of school. 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.
- Volunteering will happen after the initial six to eight weeks of school; the classroom teacher will decide exactly when after this period of time passes.
- Volunteers will be asked to not discuss the work or behavior of children that are not their own, doing so will result in the loss of opportunity to volunteer in the classroom.
- Volunteers will follow the lead of the classroom teacher.
- Volunteers will refrain from any behavior that detracts from children's concentration or development of independence.
- 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.

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SHERWOOD MONTESSORI

**Sherwood Montessori Charter School**

***Conditions for Classroom and School Visitation and Removal Policy***

Under the California Constitution, Section I (c) (c) Right to Safe Schools: All students and staff of public primary, elementary, junior high and senior high schools have the inalienable right to attend campuses which are safe, secure and peaceful. This policy is to provide procedures ensuring a safe, secure, and peaceful school for our community.

While Sherwood Montessori encourages parents/guardians and interested members of the community to visit Sherwood Montessori and view the educational program, Sherwood Montessori also endeavors to create a safe environment for students and staff. As such, parents and other visitors must adhere to the following policy in order to maximize the safety of the students and minimize the disruption to the education environment.

Parents/guardians and other visitors, including children who are not students at Sherwood Montessori, shall not loiter on Sherwood Montessori premises, including the parking lot and outside school buildings. The parking lot shall be used for picking up and dropping off students, and while conducting business. Parents/guardians and other visitors are expected to leave the campus premises upon the conclusion of any business matters or after dropping their student off at school. If a parent or guardian wishes to visit Sherwood Montessori to view the educational program, the visitor must follow the following procedures, which have been developed to ensure the safety of students and staff as well as to minimize interruption of the instructional program, pursuant to California Penal Code Sections 627, et, seq.:

1. Visits during school hours should first be arranged with the teacher and Director or designee, at least three days in advance~~.~~ , and after the first six to eight weeks of school. If a conference is desired, an appointment should be set with the teacher during non-instructional time, at least three days in advance. Parents seeking to visit a classroom during school hours must first obtain the written approval of the classroom teacher and the Director or designee.

2. All visitors shall register with the front office immediately upon entering any school building or grounds when during regular school hours. When registering, the visitor is required to provide his/her name, address, occupation, age (if under 21), his/her purpose for entering school grounds, and proof of identity. For purposes of school safety and security, the Director or designee may design a visible means of identification for visitors while on school premises.

3. The Director, or designee, may refuse to register an outsider if he or she has a reasonable basis for concluding that the visitor's presence or acts would disrupt the school, its students, its teachers, or its other employees; would result in damage to property; or would result in the distribution or use of unlawful or controlled substances.

4. The Director or designee may withdraw consent to be on campus even if the visitor has a right to be on campus whenever there is reasonable basis for concluding that the visitor presence on school grounds would interfere or is interfering with the peaceful conduct of the activities of the school, or would disrupt or is disrupting the school, its students, its teachers, or its other employees.

5. The Director or designee may request that a visitor who has failed to register, or whose registration privileges have been denied or revoked, promptly leave school grounds. When a visitor is directed to leave, the Director or designee shall inform the visitor that if he/she reenters the school without following the posted requirements he/she will be guilty of a misdemeanor.

6. Any visitor that is denied registration or has his/her registration revoked may request a hearing before the Director or the Board on the propriety of the denial or revocation. The request shall be in writing, shall state why the denial or revocation was improper, shall give the address to which notice of hearing is to be sent, and shall be delivered to either the Director or the Board President within five days after the denial or revocation. The Director or Board President shall promptly mail a written notice of the date, time, and place of the hearing to the person who requested the hearing. A hearing before the Director shall be held within seven days after the Director receives the request. A hearing before the Board shall be held at the next regularly scheduled Board meeting after the President receives the request.

7. The Director or designee shall seek the assistance of the police in dealing with or reporting any visitor in violation of this policy.

8. At each entrance to Sherwood Montessori grounds of, signs shall be posted specifying the hours during which registration is required, stating where the office of the Director or designee is located and what route to take to that office, and setting forth the penalties for violation of this policy.

9. No electronic listening or recording device may be used by students or visitors in a classroom without the teacher's and Director's written permission.

Penalties

1. Pursuant to the California Penal Code, if a visitor does not leave after being asked or if the visitor returns without following the posted requirements after being directed to leave, he/she will be guilty of a crime as specified which is punishable by a fine of up to $500.00 or imprisonment in County jail for a period of up to six (6) months or both.

2. Further conduct of this nature by the visitor may lead to the School's pursuit of a restraining order against such visitor which would prohibit him/her from coming onto school grounds or attending School activities for any purpose for a period of three (3) years.




# Parent Complaint Policy

Differences and disagreements are a part of life and Sherwood Montessori recognizes the need for healthy communication and a positive and proactive way to handle grievances that is aligned with our Mission Statement.

If parent(s) have a complaint, we ask that parent(s) report their concerns directly to the school personnel concerned, and discuss these concerns in a private meeting, preferably within 24 to 48 hours. The School Director shall be made aware of these concerns by the parents and/or individual if they are unresolved. If, in discussion with the School Director, the parent wishes to file a formal grievance, proper paperwork will be provided. The paperwork will become part of the permanent records of the school and will outline the issue and includes an appropriate timeline. The Director will meet with those filing within five working days to review the complaint. The Director will work with the parent or guardian, student, teacher, aides, or other employees whose participation is relevant in order to resolve the concern. The Director will provide a written response within 10 working days of the meeting. If the parent or guardian is not satisfied with the outcome or decision by the Director regarding the complaint, they have the right to file a written appeal with the Director within five days of receiving the response. The Board of Directors will serve as an appeals body if a complaint is not resolved. The Board will respond within 30 days of receiving the appeal. If a parent has a complaint with the Director of the school, a letter would be sent to the Board of Directors for the administrative remedy to be followed.

The Board prohibits retaliation against complainants. The Board of Directors will not investigate anonymous complaints unless it so desires. The steps above outline the process for filing a complaint and parents are expected to exhaust all the steps in this administrative remedy before pursuing other action.

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## PARENT'S PLEDGE

In an effort to protect your child and ensure their development in a positive way, the parents must respect the following pledge. This pledge seeks to remind us of the appropriate channels and ways to communicate with children, staff and parents in accordance with our complaint policy.

- We will strive to demonstrate our support for Sherwood Montessori in the way that we communicate with our children, the staff of the school and other parents. We will not be

discourteous to, threaten or use inappropriate language or actions towards any child, teacher, administrator, parents, guardian or any person acting on behalf of the school—either on or near school property, or when attending school-related functions.

- We will not approach any child, other than our own to obtain confirmation, clarification or "their view" on school-related issues, disputes or disagreements between children at school. Such matters or concerns must be brought to the Teacher or School Director's attention.

- We will take any question or suggestions to the Teacher or School Director directly. We understand that gossiping and complaining among parents is destructive and counter productive, and not in the best interest of our child's experience and education at our school.

## PARENTS' RIGHTS

1. Parents or guardians have the right to observe their child's classroom ~~within 24 hrs of making a request to the Lead Teacher.~~ . Visits during school hours should first be arranged with the teacher and Director or designee, at least three days in advance, and after the first six to eight weeks of school. The Lead Teacher will strive to accommodate the schedule of the parent. The parent will also respect that there is a flow to the daily routine that is unique to each classroom and there are times that are not appropriate as it would be disruptive to the students' learning. In the classroom, the observing parents should not interact with the children as this can be disruptive to the learning.

2. Parents or guardians have the right to file a complaint.

3. Parents or guardians have the right to review approved policies at the school site.

4. The law prohibits discrimination or retaliation against any child or parent or guardian should the parent or guardian choose to exercise his or her right to observe a classroom or file a grievance.

5. The law requires that parents or guardians be informed of their rights (see numbers 1,2, & 3 above).

6. The School Director, in the interest of safety for the children and staff, may deny access to a parent, guardian or adult if:

   a. The adult is behaving in a way that poses a risk to children in the facility;

   b. The adult is a non-custodial parent and the custodial parent has requested the facility in writing not to permit access to the non-custodial parent.

## MISSION STATEMENT

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** 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 goalsetting 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

## Volunteering

Sherwood Montessori is committed to being a school in which collaboration and high family involvement is optimized to provide students with the best possible school experience. Seeing parents helping out at the school sends a positive lesson for children. It shows them that education is valued and it is important enough to work for and invest time in. Not every family has unlimited resources of time or skills to offer, but there are things that any and all of us can do. The SMPO offers a variety of tasks and projects in which parents and families can be involved. In addition, as each family gets to know the teachers and their child's program, parents can find other ways to help. Each family is encouraged to perform a **minimum of 40 hours** of involvement hours for the school each academic year. Part of these hours may be filled by attending school performances, attending Back to School Night and Parent Education Night, and participating in school functions. For families that are unable to extend themselves beyond attendance at these types of events, a cash donation in lieu of work hours can be made to the school.

The California Department of Education asks us to provide a metric of our family involvement in our LCAP (Local Countrol Accountability Plan). That is one of the reasons we ask families to report volunteer hours. Another reason is that some grant applications ask for data showing volunteer power in our organization. A third reason is that it helps us in the office know who has experience with different volunteering options and who needs to find a way to volunteer, we can connect parents with this information.

The Parent Square App makes reporting volunteer hours easy! Please download Parent Square to keep up with communication from the school, to sign up to volunteer, to report volunteer hours, and to receive alerts from the school.

*Note: Volunteers in the classroom will be asked to wait until the period of normalization is complete, after the first six to eight weeks of school. Classroom volunteers will be asked to review the Parent Participation Policy for further guidance.*

Some examples of ways parents might volunteer include:

Classroom Environment

- providing snack for the class
- laundering dish towels at home
- cleaning the classroom (vacuuming, dusting, wiping tables and surfaces)
- caring for class pets over breaks
- sharpening pencils
- making copies

School Grounds

- sweeping up outdoor areas of the campus

- working in the garden
- completing handyperson tasks
- directing traffic before or after school
- creating a parent committee to beautify the campus

Educational Programs

- assembling booklets for the classroom
- listening to student readers
- administering spelling tests
- planning field trips
- driving and chaperoning on field trips
- helping with special projects (e.g. puppet making, cooking and gardening, art)
- sharing expertise in the classroom as a visiting guide

Fundraising and Events Planning

- planning classroom fundraisers
- joining an SMPO fundraising committee
- joining an SMPO event planning committee
- volunteering at special events (e.g. International Day, Parade of Lights, Fall Festival, Winter Performance, Variety Show, Sherwood Music Festival)
- researching grant funding sources and helping to write applications

Marketing and Communications

- updating content on the school website
- developing Sherwood's social media presence (e.g. Facebook, Instagram)
- posting school reviews on Yelp, Google, Great Schools, Niche
- distributing flyers and brochures (e.g. grocery stores, farmer's market, library, cafes)

Leadership and Governance

- serving as an SMPO coordinator (fundraising, marketing, community)
- participating on the Local Control and Accountability Plan (LCAP) committee
- serving as a member of the Board of Directors
- joining a Board committee (e.g. Development, Finance, Strategic Planning)

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Measure K Lunch Project Proposal**

**Date:** October 19, 2023

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**SUMMARY**

Serving lunch on our side of the campus can solve some issues we are having with lunchtime.

**DISCUSSION**

Currently, Sherwood is served lunch just as Chapman is leaving the cafeteria. Because meals are free for all students, there is a very long lunch line, which leaves kids at the back of the line with a short time to eat.

The cafeteria is also very noisy with students eating in a building with no sound absorption.

Chico Unified School District can provide a metal building and the appliances needed to serve lunches on our side of the campus. Sherwood would need to pay for the service of having the building transported from where it currently is in storage on Pleasant Valley High School campus and for the electrical work to prepare the building to have power for a warmer, a refrigerator, and a point-of-sale machine. Sherwood students would eat at the picnic tables under the eaves of the building that has Rooms 1,2, 6 &7.

This is an allowable expense for Measure K bond funds allocated to Sherwood in 2017.

**ACTION REQUESTED:** Approve Measure K lunch project proposal.

Attachments: Measure K Proposal and cost estimates

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

**GENERAL INFORMATION:**

| | |
|---|---|
| Submission Meeting Date | Monday, October 23, 2023 |
| 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 | 2024 |
| CDS Code | 04-61426-0121475 |
| Charter Number | 1166 |
| Website | www.sherwoodmontessori.org |

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

2. **Project Narrative:**
   Sherwood would like to set up a serving center for meals on the part of the Chapman Elementary campus it currently resides through Prop 39. Nutrition Services has a building and appliances, Sherwood would pay for transport and set up of the building as well as costs to bring electricity to the building.

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

4. **Current enrollment and ADA: 114/109.21**

5. **Financial Questions**

   a. Was your prior annual audit report free of any negative findings? _X___ yes _____ no
      *(if no, please explain)*

   b. What were your cash reserves as a percent of expenditures at the end of the prior fiscal year?
      54.55%

6. **Project Schedule**
   *Please briefly describe the timeline for the project planning and completion.*
   Project will take one day to deliver the building and one day to wire it for electricity.

7. **Preliminary Estimate (Cost)**

| | |
|---|---|
| Measure K Allocation-all rounds | 1,402,006 |
| Less Previously Allocated Funds | 394,709 |

| | |
|---|---|
| Less Current Project Funds Requested | 30,000 |
| Remaining Allocation | 977,297 |

## 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 | _____ *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 | _____ *Included* | _x__ *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 | __x___ *Included* | ___ *Not Applicable* |
| Construction Documents | _____ *Included* | _x__ *Not Applicable* |

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**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, did the proposal explain how this project was 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: _____

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Change of Signatories on Bank Account**

**Date:** October 19, 2023

---

**SUMMARY**

Consideration of request to authorize a change of signatories on the School's bank account.

**DISCUSSION**

Our current Board resolution for signatories is outdated.

**ACTION REQUESTED**

Approve additional signatories.

Attachment: Resolution 101923

SHERWOOD MONTESSORI

# RESOLUTION 101923
# IDENTIFICATION OF NEW SIGNATORY ON BANK ACCOUNT

WHEREAS, the **Chico Unified School District** authorized the charter for **Sherwood Montessori** on **3 December, 2009,** and,

WHEREAS, the **Sherwood Montessori Board of Directors** has established policies to ensure fiscal responsibility, including separation of duties; and,

WHEREAS, the **Sherwood Montessori** charges the Treasurer of the Board with the following duties as outlined in Article 5, Section 9 of the Bylaws of the Corporation, and,

WHEREAS, **Samantha Lawson** is current Board Treasurer, and,

WHEREAS, the **Sherwood Montessori Board of Directors** wishes to revise the authorized signatories on the **Northern California National Bank (NCNB)** account by adding Samantha Lawson and removing outgoing signatories, who shall:

1. Have oversight responsibility for all funds and securities of the corporation, and deposit and/or provide direction to the executive 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;
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.

NOW, THEREFORE BE IT RESOLVED that any signers from the School's prior resolutions no longer have signatory authority nor any other access to the NCNB account. Samantha Lawson, Board Treasurer, shall have signatory authority on the NCNB account. The second signatory on the School back account shall be Russell Shapiro. The School Director, Michelle Yezbick, will remain a signatory for payroll disbursements only.

PASSED AND ADOPTED by the **Sherwood Montessori Board of Directors** at a public meeting held on **19 October, 2023.**

_____ _____

**Russell Shapiro, Chair of the Board of Directors, Sherwood Montessori** **Date**

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Appointment of a Board Member**

**Date:** October 19, 2023

---

**SUMMARY**

The Board will be asked to appoint a director to the open seat on the Board.

**DISCUSSION**

We currently have an open seat 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 director.

SHERWOOD MONTESSORI

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

Date/Time: **Thursday, December 14, 2023 – 6:00 p.m.**
Location: 1071 E. 16th Street Room 1

**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, Tina Hanson-Lewis, Samantha Lawson, Kati Boomgarden, Emma Cluff

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

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

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

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

**E.3 Action Items** (6:30)

**E.3.1 First Interim Budget** (6:30)
The Budget Committee has created a First Interim Budget with revisions based on actual spending and Average Daily Attendance.
**ACTION REQUESTED:** Adopt First Interim Budget.

**E.3.2 Prop 39 Dispute of Enrollment Projections** (6:45)
Chico Unified School District has responded to our request for facilities with an ADA Projection Objection.
**ACTION REQUESTED:** Accept response.

**E.4 Board Governance** (6:55)

**E.4.1 Officer Opening: Secretary**
Board members are asked to fill the vacancy in the Secretary Office of the Board.
**ACTION REQUESTED:** Fill the officer vacancy.

**E.4.2 Conflict of Interest Policy**
Board members are asked to sign a Conflict of Interest Policy.
**ACTION REQUESTED:** Sign the Conflict of Interest Policy.

**F. FUTURE AGENDA ITEMS** (7:05)

**G. PUBLIC EMPLOYEE DISCIPLINE/DISMISSAL/RELEASE** (7:05)

(f) With respect to every item of business to be discussed in closed session pursuant to Section 54957.6

**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.

Minutes
Regular Meeting of the Board of Directors, Thursday, October 19, 2023
Sherwood Montessori Campus

6:07 pm meeting called to order. All present.

Following the Land Acknowledgement, agenda item E.4.1 was moved to the front to vote for interim Board Member Emma Cluff.

Consent agenda was approved without discussion. Tina made the motion, seconded by Kati . Vote was unanimous.

Reports were discussed briefly.

During the financial report, Pat reported average daily attendance (ADA) is improving. Directors engaged in a discussion of the ADA audit and necessary minutes for attendance. Funds are still uncertain from Sacramento. Final funding will be based on the April Period 2 ADA report.

Agenda item E.3.1 Policy Revision led to a detailed discussion with the following additions recommended:

"Volunteers. Refrain from any behavior that the teacher deems detracting…

PARENTS' RIGHTS

1. Parents or guardians have the right to observe their child's classroom within 24 hrs of making a request to the Lead Teacher. Visits during school hours ~~should~~ will first be arranged with the teacher ~~and Director or designee~~ ~~at least three days in advance, and~~ and occur after the first six to eight weeks of school. The Lead Teacher will strive to accommodate the schedule of the parent. The parent will also respect that…

*Note: Volunteers in the classroom will ~~be asked to~~ wait until the period of normalization is complete, after the first six to eight weeks of school. Classroom volunteers will be asked to review the Parent Participation Policy for further guidance.*

Following discussion, Sami made the motion to approve, seconded by Emma, and the approval vote was unanimous.

E.3.2 Measure K discussion. Board agreed to approve with a cap 3$0K. Motion to approve by Kati, Emma seconded, approval unanimous.

E.3.3 New Signers on Account. Motion by Tina, Emma seconded, approval unanimous.

As a member of the public appeared, we reintroduced item C. Public Comment. Question from Daniel Green on why we don't have a grant writer? Daniel also asked about a budget for advertising. Discussion included a comment to update our website that the Zoom broadcasts of Board meetings are now over.

Board went into closed meeting at 8:05 to discuss personnel issues.

End of closed meeting at 9:24

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** December 14, 2023

---

**Administrative**

- Updated enrollment will be reported at the meeting.
- We have filled two vacancies in the Learning Center with existing staff. Kimberly Fellner will be our Learning Center Aide, and Stacy Gertz will be our Reading Instructor.

**Legislative**

- The state budget deficit will impact California public schools, but it is too early to report exactly what that will mean for Sherwood.

**Community & Promotion**

- I have been giving some well-attended school tours for families interested in enrolling in Sherwood next year. It is a great pleasure to show off our wonderful school!
- The Music Matters fundraiser with Kai Music School at Mulberry Station raised about $400 for the end of the year field trip for the middle school, plus our students got to perform on a stage.
- By this meeting time, our kids will have also performed on the El Rey Theater stage for our annual Winter Performance.

# SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

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

**Date:** December 14, 2023, Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of November 2023 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 697,855 as of November 30,2023 for the checking account.
- The expenses in November were for the normal operating cost.

Profit & Loss

The November 2023 Profit & Loss report shows a Net Income of $ -244,375, which was offset by $ 48,818 LCF funds deposited in December 2023 along with $ 8,211 of State ELOP funds. The actual Net Income was $ -187,346.

- Cash Flow
  The school should end the year with a positive cash balance assuming the final ADA is greater than 95 and state revenues are not significantly reduced. The Legislative Analyst's Office is projecting a $69B deficit for 2022 and 2023 tax collections. This will result in a call back of funds received in 2022-23 and a reduction in 2023-24 apportionment. Estimated amounts will not be known until January-February 2024.

# Sherwood Montessori
## Profit & Loss YTD Comparison
July through November 2023

| | Jul - Nov 23 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | 468,062 |
| **Total Income** | 468,062 |
| **Gross Profit** | 468,062 |
| **Expense** | |
| **1000 Certificated Salaries** | 216,140 |
| **2000 Classified Salaries** | 181,305 |
| **3000-Employee Benefits** | 135,580 |
| **4000-Books and Supplies** | 22,949 |
| **5000 Services/Other Op. Exp.** | 156,462 |
| **Total Expense** | 712,437 |
| **Net Ordinary Income** | -244,375 |
| **Net Income** | **-244,375** |

**Sherwood Montessori**
**Board of Directors - Vendor Payments Report**
**November 2023**

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 11/01/2023 | ACH | CharterSAFE | BILLED PREMIUM - LIABILI... | 5400-Liability Insurance | 3,129.00 |
| Check | 11/01/2023 | ACH | CharterSAFE | BILLED PREMIUM - WC 20... | 3601-Workers Comp | 1,488.00 |
| Check | 11/01/2023 | ACH | Macquarie Equipment Capit... | Kyocera Copier Lease 2023 ... | Copier Lease | 223.00 |
| Check | 11/01/2023 | DBT | Amazon.com | CANVASES/BRUSHES FO... | Instructional Supplies | 40.00 |
| Check | 11/02/2023 | 9761 | Advanced Document | SERVICE-2023 OCT | Copier Lease | 749.87 |
| Check | 11/02/2023 | EFT | Comcast 4454 | SERVICE - 2023 NOV | Internet Service Provider | 325.72 |
| Check | 11/02/2023 | EFT | Achieve Charter School of ... | INV DOC SERVICE - 23/24 | Contracted Service | 250.00 |
| Check | 11/02/2023 | DBT | PANERA BREAD | UE PBIS | Food - Meetings | 48.97 |
| Check | 11/03/2023 | dbt | Amazon.com | LCAL GOAL | PE | 61.69 |
| Check | 11/06/2023 | DBT | Grocery Outlet | GREETING CARDS | Office Supplies | 14.61 |
| Check | 11/06/2023 | DBT | Home Depot | RILLA TAPE CUSTODIAL S... | Office Supplies | 45.11 |
| Check | 11/06/2023 | DBT | MATH GAMES | ANNUAL FEE - WILL BE CA... | Instructional Supplies | 90.00 |
| Check | 11/07/2023 | EFT | Waste Management | SERVICE - 2023 OCT | Trash/Recycling | 140.44 |
| Check | 11/07/2023 | DBT | Costco | SNACKS | Extended Day | 462.93 |
| Check | 11/07/2023 | DBT | USPS | MAILINGS | Postage | 17.10 |
| Check | 11/08/2023 | 9762 | EL RAY THEATRE | Winter Festival venue rental | Fundraising Expenses | 1,650.00 |
| Check | 11/08/2023 | 9763 | City of Chico | SERVICE - 2023 OCT | Sewer | 28.87 |
| Check | 11/08/2023 | 9764 | Hernandez Cleaning Service | SERVICE 2023 OCT | Housekeeping Services | 5,060.00 |
| Check | 11/08/2023 | 9765 | Maia Illa, LCSW | Supervision-Swanson INV | Contracted Service | 720.00 |
| Check | 11/08/2023 | DBT | TIME For Kids | SUBSCRIPTION FOR BOO... | Instructional Supplies | 115.50 |
| Check | 11/09/2023 | 7528 | Heather Frey | LIVESCAN | LiveScan and TB Test Servi... | 66.00 |
| Check | 11/13/2023 | DBT | Amazon.com | MATERIALS | Extended Day | 95.80 |
| Check | 11/13/2023 | ACH | COSTCO VISA CARD | THRU 15TH PURCHASES 2... | SHERWOOD COSTCO VISA | 8,906.03 |
| Check | 11/14/2023 | DBT | Directional Ad-Vantage Hol... | CHICO MALL KIOSK - 2023 ... | Advertising | 295.00 |
| Check | 11/15/2023 | 9767 | Steven Duke | TECH SUPPORT INV 008 | Contracted Service | 150.00 |
| Check | 11/15/2023 | 9766 | Barney James Kerr | 33.00 x 5.0 HOURS | Contracted Service | 165.00 |
| Check | 11/15/2023 | 9766 | Barney James Kerr | 97.69 | Maintenance Supplies | 97.69 |
| Check | 11/15/2023 | 9768 | PARK AVENUE PEST CO... | SERVICE 2023 nov | Pest Control | 85.00 |
| Check | 11/15/2023 | EFT | Comcast Business 9110 | SERVICE - 2023 NOV-DEC | Telephone, Landline | 184.29 |
| Check | 11/15/2023 | EFT | PG & E | SERVICE-2023 NOV | Electricity | 589.30 |
| Check | 11/15/2023 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conferences | 50.00 |
| Check | 11/15/2023 | DBT | Amazon.com | ALPHABET BOOK LABELS | Instructional Supplies | 32.43 |
| Check | 11/17/2023 | EFT | California Water Service C... | SERVICE-2023 OCT | Water | 31.04 |
| Check | 11/17/2023 | EFT | Securly, Inc. | 1 YEAR CONTRACT | Internet Filtering (CIPA) | 1,161.60 |
| Check | 11/17/2023 | EFT | Michelle Yezbick | TRAVEL TO SELPA | 5200-Travel and Conferences | 136.24 |
| Check | 11/17/2023 | ACH | HP LEASE 7603 | Lease Payment - Customer I... | HP DIRECT LEASE | 319.17 |
| Check | 11/18/2023 | DBT | Amazon.com | SPRAY PAINT | Maintenance Supplies | 46.63 |
| Check | 11/18/2023 | DBT | Amazon.com | SARNY | Instructional Supplies | 17.30 |
| Check | 11/20/2023 | DBT | Wufoo | SERVICE - 2023 NOV-DEC | Online List Management | 19.00 |
| Check | 11/20/2023 | DBT | Secretary of State-CA | CORP FILE FEE | 5300-Dues and Membership | 30.00 |
| Check | 11/22/2023 | DBT | Nienhuis | BOTANY PUZZLE-BOCKS-... | Instructional Supplies | 532.83 |
| Check | 11/24/2023 | ACH | Verizon Wireless | SERVICE- 2023 NOV | Telephone, Cellular | 94.54 |
| Check | 11/24/2023 | DBT | Amazon.com | MONTHLY FEE 2023-NOV | Contracted Service | 16.23 |
| Check | 11/25/2023 | DBT | Amazon.com | 3D PRINTER AND WASH S... | Instructional Supplies | 352.88 |
| Check | 11/27/2023 | DBT | Office Depot | SUPPLIES | Instructional Supplies | 260.17 |
| Check | 11/28/2023 | DBT | Costco | SNACKS | Extended Day | 402.96 |
| Check | 11/29/2023 | 7529 | Vanessa Aripez | REFUND OF PORTION OF ... | 3903-Other Employee Benefits | 500.00 |
| Check | 11/29/2023 | DBT | Michaels | FACEPAINT - COMMUNITY ... | Instructional Supplies | 36.78 |
| Check | 11/29/2023 | DBT | Amazon.com | TK-8 SUPPLIES | Instructional Supplies | 50.62 |
| Check | 11/30/2023 | 9770 | Barney James Kerr | MATERIALS | Maintenance Supplies | 34.93 |
| Check | 11/30/2023 | 9771 | Chico Country Day | NURSE CONTRACT INV 24... | Contracted Service | 1,298.71 |
| Check | 11/30/2023 | EFT | Heather Fisher | MILEAGE | 5200-Travel and Conferences | 15.75 |
| Check | 11/30/2023 | 7540 | Stacy .Gertz | REFUND SS DEDUCTION ... | 3903-Other Employee Benefits | 273.32 |
| Bill | 11/30/2023 | INV 20... | Pat Casey | CONTRACTED SERVICE 2... | Business Manager Services | 4,700.00 |
| Check | 11/30/2023 | DBT | Learning A-Z | RAZ-PLUS READING A-Z LI... | Software Licensing | 241.00 |
| Check | 11/30/2023 | DBT | Amazon.com | TK-8 SUPPLIES | Instructional Supplies | 36.78 |
| Check | 11/30/2023 | | | Service Charge | Bank Fees | 27.00 |
| **TOTAL** | | | | | | **36,012.83** |

| 2023-24<br>12-14-23 BOARD<br>1ST INTERIM BUDGET | FUNDING AT 95 ADA<br>105 Enroll. x 90% attendance<br>2023-24 ORIGINAL BUDGET | FUNDING AT 105 ADA<br>114 Enroll. x 92% attendance<br>2023-24 1ST INTERIM BUDGET | CHANGE | | FUNDS TIED TO STATE DEFICIT |
|---|---|---|---|---|---|
| **Revenue** | | | | | |
| 8011 Local Control Funding | 632,137 | ***635,820*** | | | |
| 8012 Education Protection Act | 297,918 | ***323,606*** | | | |
| 8019 Prior Year Overpaid Adjustment | | | - | | |
| 8096 In Lieu Taxes | 270,000 | ***298,606*** | | | |
| Subtotal LCFF Revenues | ***1,200,055*** | ***1,258,032*** | 57,977 | ***4.83%*** | 1,258,032 |
| 8290 - TITLE I | | | | | |
| 8290 - TITLE I + ESSER TOTAL | **50,000** | **50,000** | - | | |
| 8181 - Spec. Educ.- SELPA Fed | | 11,960 | 11,960 | | |
| 8311 - Spec. Educ. - SELPA State | 68,000 | 81,641 | 13,641 | | |
| 8312 - Spec. Educ. - SELPA ERMHS | 3,000 | 5,600 | 2,600 | | |
| 8550 - Mandates Block Grant | 2,500 | 2,500 | - | | |
| 8560 - State Lottery | 30,000 | 25,000 | (5,000) | | |
| 8590 - Educator Effectiveness-6266 | | | - | | |
| 8590 - ELOG-P | ***50,000*** | ***50,000*** | - | | 50,000 |
| 8590 - UPK | ***25,000*** | ***34,000*** | 9,000 | | 34,000 |
| 8590 - AMIM | | | - | | |
| 8590 - LREBG | ***56,100*** | | (56,100) | | - |
| 8699 Other Local Revenue | 3,000 | 3,000 | - | | |
| **TOTAL REVENUES** | **1,487,655** | **1,521,733** | 34,078 | | *1,342,032* |
| | | | State Deficit | 6% | ***80,522*** |
| **Expense** | | | State Deficit | 12% | ***161,044*** |
| 1000 Certificated Salaries | 532,580 | 503,915 | (28,665) | 28% | |
| 2000 Classified Salaries | 542,266 | 522,866 | (19,400) | 29% | |
| 3000 Employee Benefits | 326,290 | 328,003 | 1,713 | 18% | |
| **SUBTOTAL** | ***1,401,136*** | ***1,354,784*** | (46,352) | 76% | |
| 4100 Texts and Core Curricula | 3,000 | 500 | (2,500.00) | | |
| 4200 Reference Materials | 3,000 | 3,000 | - | | |
| 4300 Materials and Supplies | 27,400 | 36,800 | 9,400 | | |
| 4400 NonCap Equipment | 12,000 | 3,000 | (9,000) | | |
| 4700 Food (Nutrition) | 2,000 | 800 | (1,200) | | |
| **SUBTOTAL** | ***47,400*** | ***44,100*** | (3,300) | 2% | |
| 5200 Travel and Conferences | 3,000 | 3,000 | - | | |
| 5300 Dues and Memberships | 1,700 | 2,000 | 300 | | |
| 5400 Property/Liability Insurance | 38,000 | 38,000 | - | | |
| 5500 Operations / Housekeeping | 103,100 | 94,900 | (8,200) | | |
| 5600 Rentals, Leases, and Repairs | 12,000 | 12,000 | 0 | | |
| 5800 Prof. & Consulting Services | 192,600 | 209,250 | 16,650 | 12% | |
| 5900 Communications | 24,200 | 28,200 | 4,000 | | |
| **SUBTOTAL** | ***374,600*** | ***387,350*** | 12,750 | 22% | |
| 6200 CAPITAL OUTLAY- BLDG | | | | | |
| **TOTAL EXPENDITURES** | **1,823,136** | **1,786,234** | **(36,902)** | 100% | |
| **Net Income** | ***(335,481)*** | ***(264,501)*** | **ADA Equiv.** | **-26** | |
| **Unassigned/Unappropriated - Prior Year** | **785,132** | **561,743** | | | |
| **Restricted Grant Funds - Prior Year** | | **75,000** | | | |
| **Unassigned/Unappropriated - Proj. Yr End** | **700,000** | **297,242** | **ADA Equiv.** | **30** | |
| **Reserve - Economic Uncertainties** | **120,000** | **120,000** | **Est. 1 mos. salary/benes.** | | |
| **Unassigned/Unappropriated Amount** | **86,662** | **177,242** | **ADA Equiv.** | **18** | |
| **Restricted Grant Funds** | **493,338** | **75,000** | | | |

**CHARTER SCHOOL**
**INTERIM FINANCIAL REPORT - ALTERNATIVE FORM**
**First Interim Report - Detail**

**Charter School Name:** Sherwood Montessori
**(continued)** Charter School
**CDS #:** 04-61424-0121475
**Charter Approving Entity:** Chico Unified School Dis
**County:** Butte
**Charter #:** 1166
**Fiscal Year:** 2023-24

*This charter school uses the following basis of accounting:*

[X] **Accrual Basis** (Applicable Capital Assets / Interest on Long-Term Debt / Long-Term Liabilities objects are 6900, 7438, 9400-9499, and 9660-9669)

[ ] **Modified Accrual Basis** (Applicable Capital Outlay / Debt Service objects are 6100-6170, 6200-6500, 7438, and 7439)

| Description | Object Code | Adopted Budget - July 1 | | | Actuals thru 10/31 | | | 1st Interim Budget | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | | Unrestricted | Restricted | Total | Unrestricted | Restricted | Total | Unrestricted | Restricted | Total |
| **A. REVENUES** | | | | | | | | | | |
| **1.** Revenue Limit Sources | | | | | | | | | | |
| Local Control Funding | 8011 | 632,137 | | 632,137 | 103,058 | | 103,058 | 635,820 | | 635,820 |
| Education Protection Act Funding | 8012 | 297,918 | | 297,918 | 71,176 | | 71,176 | 323,606 | | 323,606 |
| Charter Schools Gen. Purpose Entitlement - State Aid | 8015 | | | - | | | - | | | - |
| State Aid - Prior Years | 8019 | | | - | | | - | | | - |
| Tax Relief Subventions (for rev. limit funded schools) | 8020-8039 | | | - | | | - | | | - |
| County and District Taxes (for rev. limit funded schools) | 8040-8079 | | | - | | | - | | | - |
| Miscellaneous Funds (for rev. limit funded schools) | 8080-8089 | | | - | | | - | | | - |
| Revenue Limit Transfers (for rev. limit funded schools): | | | | | | | | | | |
| PERS Reduction Transfer | 8092 | | | - | | | - | | | - |
| Other Revenue Limit Transfers | 8091, 8096 | 270,000 | | 270,000 | 101,003 | | 101,003 | 298,606 | | 298,606 |
| Total, Revenue Limit Sources | | 1,200,055 | - | 1,200,055 | 275,237 | - | 275,237 | 1,258,032 | - | 1,258,032 |
| **2.** Federal Revenues | | | | | | | | | | |
| Title I | 8290 | | 50,000 | 50,000 | | | - | | 50,000 | 50,000 |
| Special Education - Federal | 8181, 8182 | | | - | | | - | | 11,960 | 11,960 |
| Child Nutrition - Federal | 8220 | | | - | | | - | | | - |
| Other Federal Revenues | 8110, 8260-8299 | | | - | | 17,676 | 17,676 | | | - |
| Total, Federal Revenues | | - | 50,000 | 50,000 | - | 17,676 | 17,676 | - | 61,960 | 61,960 |
| **3.** Other State Revenues | | | | | | | | | | |
| Charter Schools Categorical Block Grant | 8590 | 2,500 | | 2,500 | | | - | 2,500 | | 2,500 |
| Special Education - State | StateRevSE | | 71,000 | 71,000 | | 25,059 | 25,059 | | 87,241 | 87,241 |
| All Other State Revenues | StateRevAO | 76,100 | 85,000 | 161,100 | | 50,902 | 50,902 | 25,000 | 84,000 | 109,000 |
| Total, Other State Revenues | | 78,600 | 156,000 | 234,600 | - | 75,961 | 75,961 | 27,500 | 171,241 | 198,741 |
| **4.** Other Local Revenues | | | | | | | | | | |
| Charter Schools Funding in Lieu of Property Taxes | 8096 | | | - | | | - | | | - |
| All Other Local Revenues | LocalRevAO | 3,000 | | 3,000 | 1,455 | | 1,455 | 3,000 | | 3,000 |
| Total, Local Revenues | | 3,000 | - | 3,000 | 1,455 | - | 1,455 | 3,000 | - | 3,000 |
| **5.** TOTAL REVENUES | | 1,281,655 | 206,000 | 1,487,655 | 276,692 | 93,637 | 370,329 | 1,288,532 | 233,201 | 1,521,733 |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Prop 39 Dispute of Enrollment Projections**

**Date:** December 14, 2023

---

**SUMMARY**

CUSD has responded to our request for facilities with a dispute of our enrollment projections.

**DISCUSSION**

CUSD has responded to our request for facilities with a dispute of our enrollment projections. This does not mean that they don't intend to provide facilities, but rather they may offer fewer classrooms than we now occupy. Their letter outlines the methodology used to determine an alternate projected enrollment.

**ACTION REQUESTED**

Accept response.

Attachment: Prop 39 Request Response

**Administrative Offices**
**1163 E. Seventh Street Chico, CA 95928-5999**

**Facilities Department** (530)891-3000 x 20602
2455 Carmichael Drive
Chico, CA 95928

**CERTIFIED MAIL**

December 1, 2023

Ms. Michelle Yezbick, School Director
Sherwood Montessori
1010 Cleveland
Chico, CA 95928

Re: Proposition 39 Facilities Request for 2024/2025 Response to Sherwood Montessori's Enrollment Projections

Dear Ms. Yezbick:

The Chico Unified School District ("CUSD") responds to the October 26, 2023, Request for Facilities for Sherwood Montessori ("Sherwood") for the 2024/2025 school year pursuant to California Administrative Code (CAC), Title 5 §11969.9(d).

**INTRODUCTION**

The regulations implementing Proposition 39, specifically, CAC, Title 5, §11969.9(d), permit a school district to assess the projections upon which a charter school's facilities request is based, express objections to those projections, and issue a counter projection:

> "The school district shall review the charter school's projections of in-district and total ADA and in-district and total classroom ADA and, on or before December 1, express any objections in writing and state the projections the district considers reasonable. If the district does not express objections in writing and state its own projections by the deadline, the charter school's projections are no longer subject to challenge, and the school district shall base its offer of facilities on those projections."

In conducting its evaluation, the District assesses whether the charter school's Request for Facilities meets the requirements contained in the regulations governing such a request. CAC, Title 5, §11969.9(c)(1) provides as follows:

The written facilities request consists of:

(A) reasonable projections of in-district and total ADA and in-district and total classroom ADA, based on ADA claimed for apportionment, if any, in the fiscal year prior to the fiscal year in which the facilities request is made, adjusted for expected changes in enrollment in the forthcoming fiscal year;

(B) a description of the methodology for the projections;

(C) if relevant (i.e., when a charter school is not yet open or to the extent an operating charter school projects a substantial increase in in-district ADA), documentation of the number of in-district students meaningfully interested in attending the charter school that is sufficient for the district to determine the reasonableness of the projection, but that need not be verifiable for precise arithmetical accuracy;

(D) the charter school's operational calendar;

(E) information regarding the district school site and/or general geographic area in which the charter school wishes to locate; and

(F) information on the charter school's educational program, if any, that is relevant to assignment of facilities.

(2) Projections of in-district ADA, in-district classroom ADA, and the number of in-district students shall be broken down by grade level and by the school in the school district that the student would otherwise attend...

CUSD objects to Sherwood's projections as set forth below.

**REVIEW OF SHERWOOD'S ADA PROJECTIONS:**

Proposition 39 only obligates a school district to offer facilities commensurate with a charter school's in-district population. CAC, Title 5, §11969.2 defines an in-district student as:

[A] student attending a charter school is an "in-district student" of a school district if he or she is entitled to attend the schools of the school district and could attend a school district-operated school, except that a student eligible to attend the schools of the school district based on inter-district attendance pursuant to Education Code §46600-46611 or based on parental employment pursuant to

Education Code §48204(b) shall be considered a student of the school district where he or she resides.

Therefore, CUSD will evaluate Sherwood's in-district Classroom ADA projections unless in-district ADA information is not available.

Sherwood's projected in-district ADA projection for the following school year is as follows:

**Total In-District Classroom ADA**

| Grade Level | Actual ADA 2022-2023 | Projected ADA 2023-2024 | ADA Projection for 2024-2025 |
|---|---|---|---|
| TK | 6.58 | 7.40 | 17.57 |
| K | 12.67 | 12.03 | 17.57 |
| 1 | 8.43 | 10.18 | 12.03 |
| 2 | 8.17 | 11.10 | 10.18 |
| 3 | 22.55 | 10.18 | 11.10 |
| 4 | 8.46 | 20.35 | 10.18 |
| 5 | 9.45 | 8.33 | 20.35 |
| 6 | 6.31 | 6.48 | 8.33 |
| 7 | 4.11 | 5.55 | 6.48 |
| 8 | .99 | 4.63 | 5.55 |
| **TOTAL** | 87.72 | 96.21 | 119.34 |

**CUSD'S Evaluation of Sherwood's Historical ADA Projections:**

CUSD has evaluated the four-year kindergarten enrollment information Sherwood has provided. This analysis is based on total ADA vs. in-district ADA as the Monthly Attendance Report (P-2) does not distinguish between the two. (We have not included the 2019/20 school year due to COVID-19 impacts on enrollment.)

| Year | Projected TK/K Enrollment | Actual TK/K Enrollment | Difference |
|---|---|---|---|
| 2020/21 | 37.73 | 30.79 | -6.94 |
| 2021/22 | 45.98 | 14.86 | -31.12 |
| 2022/23 | 20.00 | 13.09 | -6.91 |
| 2023/24 | 27.55 | 20.14 | -7.41 |
| Total | 131.26 | 78.88 | -52.38 |
| Average Difference | 32.815 | 19.72 | -13.095 |

In addition, CUSD has reviewed Sherwood's actual enrollment over the past four years. Sherwood shows a trend of decreased enrollment in all four years.

| Year | Projected TK/K-8 Enrollment | Actual TK/K-8 Enrollment | Increase/Decrease |
|---|---|---|---|
| 2020/2021 | 174.604 | 145.32 | -29.284 |
| 2021/2022 | 154.55 | 115.20 | -39.35 |
| 2022/2023 | 123.36 | 101.5 | -21.86 |
| 2023/2024 | 116.63 | 92.30 | -24.33 |
| Averages & Overall Decrease | 142.286 | 113.58 | -28.706 |

Based on this information, CUSD cannot support Sherwood's projected increase of 23.13 in-district students or the equivalent of a 24% increase in enrollment.

**CUSD COUNTER PROJECTIONS**

CUSD is exercising its right to provide counter projections to Sherwood's enrollment projections for 2024/25. CUSD's counter projections are based on the following primary factor (as well as the other reasons stated in this letter):

- Sherwood's historical ADA projections, as compared to actual P-2 ADA for that school year;

Based on the factors discussed above, CUSD counter projects a total of 109.34 in-District students. CUSD's counter projections for each grade level are set forth in the following chart:

| Grade Level | Sherwood's Enrollment Projections | CUSD's Enrollment Projections | Difference |
|---|---|---|---|
| TK | 17.57 | 12.57 | (5.0) |
| K | 17.57 | 12.57 | (5.0) |
| 1 | 12.03 | 12.03 | 0 |
| 2 | 10.18 | 10.18 | 0 |
| 3 | 11.10 | 11.10 | 0 |
| 4 | 10.18 | 10.18 | 0 |
| 5 | 20.35 | 20.35 | 0 |
| 6 | 8.33 | 8.33 | 0 |
| 7 | 6.48 | 6.48 | 0 |
| 8 | 5.55 | 5.55 | 0 |
| | 119.34 | 109.34 | (10.0) |

**CONCLUSION:**

After analyzing Sherwood's projected enrollment versus actual enrollment as reported on the P-2, CUSD has determined that the Sherwood's enrollment projections have been consistently over-estimated over the four-year period.

CAC, Title 5, §11969.9(d) permits a school district to assess the projections upon which a charter school's facilities request is based and express objections to those projections.

Under CAC, Title 5, §11969.9(e), Sherwood has until January 1, 2023 to deliver a written response to this letter:

> "On or before January 1, the charter school shall respond to any objections expressed by the school district and to the district's projections provided pursuant to subdivision (d). The charter school shall reaffirm or modify its previous projections as necessary to respond to the information received from the district pursuant to subdivision (d). If the charter school does not respond by the deadline, the district's projections provided pursuant to subdivision (d) are no longer subject to challenge, and the school district shall base its offer of facilities on those projections."

Please be advised that CAC, Title 5, §11969.9(e) does not permit Sherwood to submit any additional documentation in support of its request, but only to respond to, reaffirm or modify its projection.

Sincerely,

Julia M. Kistle

Julia M. Kistle
Director, Facilities and Construction

cc: Kristine Keene, Director, State and Federal Programs
Jaclyn Kruger, Assistant Superintendent, Business Services
Kelly Staley, Superintendent

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** December 14, 2023

---

**SUMMARY**

The following officers are required to fulfill our charter: Chair, Vice Chair, Treasurer and Secretary. There is an opening for the Secretary position.

**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 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.

**ACTION REQUESTED**

Fill the officer vacancy.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Conflict of Interest Policy**

**Date:** December 14, 2023

---

**SUMMARY**

Directors are required to refrain from activities that might result in a possible excess benefit transaction.

**DISCUSSION**

Sherwood's Conflict of Interest Policy was adopted to apprise directors of their legal obligations to avoid activities that are defined as conflicts of interest. Having a signed document provides assurance that all board members are aware of their responsibilities regarding this legal issue.

**ACTION REQUESTED**

Sign Conflict of Interest Policy.

Attachment: Conflict of Interest Policy

SHERWOOD MONTESSORI

# Conflict of Interest Policy

## Article I Purpose

The purpose of the conflict of interest policy is to protect this tax-exempt organization's (Sherwood Montessori) interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Organization or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

## Article II Definitions

1. **Interested Person**

Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

2. **Financial Interest**

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

**a.** An ownership or investment interest in any entity with which the Organization has a transaction or arrangement,

**b.** A compensation arrangement with the Organization or with any entity or individual with which the Organization has a transaction or arrangement, or

**c.** A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Organization is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial. A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

## Article III Procedures

1. **Duty to Disclose**

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

**2. Determining Whether a Conflict of Interest Exists**

After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

**3. Procedures for Addressing the Conflict of Interest**

**a.** An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.

**b.** The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

**c.** After exercising due diligence, the governing board or committee shall determine whether the Organization can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

**d.** If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Organization's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

**4. Violations of the Conflicts of Interest Policy**

**a.** If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.

**b.** If, after hearing the member's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

## Article IV Records of Proceedings

The minutes of the governing board and all committees with board delegated powers shall contain:

**a.** The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.

**b.** The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

## Article V Compensation

**a.** A voting member of the governing board who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member's compensation.

**b.** A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member's compensation.

**c.** No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

## Article VI Annual Statements

Each director, principal officer and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

**a.** Has received a copy of the conflicts of interest policy,
**b.** Has read and understands the policy,
**c.** Has agreed to comply with the policy, and
**d.** Understands the Organization is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

## Article VII Periodic Reviews

To ensure the Organization operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

**a.** Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining.

**b.** Whether partnerships, joint ventures, and arrangements with management organizations conform to the Organization's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

## Article VIII Use of Outside Experts

When conducting the periodic reviews as provided for in Article VII, the Organization may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

## WRITTEN CONSENT OF DIRECTORS ADOPTING CONFLICT OF INTEREST POLICY

We, the undersigned, are all of the persons named as the current Directors in the Articles of Incorporation of Sherwood Montessori, a California nonprofit corporation, and, pursuant to the authority granted to the Directors by the Bylaws of the corporation, consent to, and hereby do, adopt the foregoing Conflict of Interest Policy, consisting of three (3) pages.

_____
Russell Shapiro, Director

_____
Kati Boomgarden, Director

_____
Tina Hanson-Lewis, Director

_____
Emma Cluff, Director

_____
Samantha Lawson, Director

SHERWOOD MONTESSORI

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

Date/Time: **Thursday, January 18, 2024 – 6:00 p.m.**
Location: 1071 E. 16th Street Room 1

**AGENDA**

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

**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, Tina Hanson-Lewis, Samantha Lawson, Kati Boomgarden, Emma Cluff

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

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, December 14, 2023.

**B.2 Audit** The Board is asked to accept the Independent Financial Audit for the 2022-2023 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**

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.

*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 Items** (6:40)

**E.3.1 Purchasing Policy Revision** (6:40)
The Board is asked to consider revisions to the Purchasing Policy.
**ACTION REQUESTED:** Approve policy revisions.

**E.3.2 Travel Policy Revision** (6:50)
The Board is asked to consider revisions to the Travel Policy.
**ACTION REQUESTED:** Approve policy revisions.

**E.3.3 School Accountability Report Card (SARC) 2022-2023** (7:00)
The Board is asked to approve the draft of the SARC.
**ACTION REQUESTED:** Approve SARC draft.

**E.4 Board Governance** (7:10)
The Board may discuss any aspect of the upcoming retreat.

**F. FUTURE AGENDA ITEMS** (7:20)
A Mid-Year LCAP Presentation will be given to update parents, the Board, and all stakeholders on the progress towards meeting goals set forth in the LCAP.

**G. ADJOURNMENT** (7:25)

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.

Draft Minutes

Regular Meeting of the Board of Directors, Thursday, December 14th, 2023
Sherwood Montessori Campus

6:09 pm meeting called to order. All present except for Russell.

Consent agenda - will need to edit E.3.2 to state $30K instead of 3$0K for clarity.
Sam motion, Katy seconds approval of minutes

Public comment - Daniel Green. Concerns about procedure regarding board meeting scheduling for the November meeting, which did not take place. Expressed concerns about the conclusion time for breakfast for the student. Expressed concerns about his own children not being allowed to call home during the school day, or needing to be supervised. Expressed concerns about a student being unenrolled from the school because the student was being bullied. Expressed concerns about the major and minor system and how that is reported back to parents.

Reports were briefly discussed

Action Items
E.3.1 - Interim Budget  Motioned by Emma, seconded by Sam, the approval vote was unanimous (6:35)
E.3.2 Prop 39 Dispute of Enrollment Projections. Motioned by Katy, seconded by Sam, Accepted unanimously (6:37)
E.4.1 Secretary - Emma to be voted in as secretary. Sam motioned, Katy seconded, vote unanimous. (6:40)
E.4.2 Conflict of Interest - signed by all present. Russell will need to sign. (6:45)

Board went to closed meeting at 6:45
Closed meeting concluded at 7:35

December 29, 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, 2023, and have issued our report thereon dated December 29, 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 19, 2023.

## 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. As described in note 1 to the financial statements, the Charter School adopted the provisions of Financial Accounting Standards Board (FASB) Accounting Standards Update (ASU) No. 2016-02, *Leases (Topic 842)*, as of July 1, 2022. The ASU increases transparency and comparability among organizations by recognizing lease assets and lease liabilities on the statement of financial position and by disclosing key information about leasing arrangements. Accordingly, the Charter School's financial statements have been presented in accordance with the guidance from this statement. 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 commitments and contingencies.

## 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 attached schedule summarizes the misstatements that we identified as a result of our audit procedures that were brought to the attention of, and corrected by, management. These adjustments resulted in a net decrease to net assets of $47,782.

## 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 December 29, 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 & Gaeteurn, LLP

**Sherwood Montessori**

**Schedule of Year-End Adjusting Journal Entries**

**June 30, 2023**

| CLIENT TO RECORD THESE AUDIT ADJUSTMENTS IN THE GENERAL LEDGER | SACS Resource Account | SACS Object Account | Debit | Credit |
|---|---|---|---|---|
| | | | | |
| | | | | |
| Audit adjustment | 6230 | 9793 | 9,126 | |
| Accumulated depreciation | 6230 | 9435 | | 9,126 |
| | | | | |
| *To record current year depreciation expense.* | | | | |
| | | | | |
| Audit adjustment | 0000 | 9793 | 1,441 | |
| Unrestricted net assets | 0000 | 9790 | | 1,441 |
| | | | | |
| *To adjust beginning net assets to agree to prior year audit report.* | | | | |
| | | | | |
| Audit adjustment | 0000 | 9793 | 4,752 | |
| Due to CUSD - district oversight | 0000 | 9590 | | 4,752 |
| | | | | |
| *To adjust in-lieu balances to actual at June 30, 2023 per in-lieu exhibit.* | | | | |
| | | | | |
| Due from grantor government: restricted lottery | 1100 | 9290-10 | 2,637 | |
| Due from grantor government: unrestricted lottery | 0000 | 9290-11 | 8,718 | |
| Due from state government | 0000 | 9292 | 5,181 | |
| Audit adjustment | 1100 | 9793 | 6,730 | |
| Due to grantor governments | 0000 | 9590 | | 23,266 |
| | | | | |
| *To adjust lottery payable/receivable to actual per lottery calculation.* | | | | |
| | | | | |
| Due from grantor government: LCFF | 0000 | 9290-06 | 57,779 | |
| Audit adjustment | 0000 | 9793 | | 57,779 |
| | | | | |
| *To adjust LCFF due from to actual.* | | | | |
| | | | | |
| Audit adjustment | 0000 | 9793 | 20,837 | |
| Due to state government | 0000 | 9592 | | 20,837 |
| | | | | |
| *To record amount due back for apportionment reduction of the learning recovery block grant.* | | | | |
| | | | | |
| Audit adjustment | 0000 | 9793 | 62,675 | |
| Due from state government | 0000 | 9292 | | 33,567 |
| Refundable advances | 0000 | 9650 | | 29,108 |
| | | | | |
| *To adjust pre-k grant fund recognition until qualifying expenditures are incurred according to the recognition standard.* | | | | |
| | | | | |
| | | | | |

# Sherwood Montessori

**Chico, California**
**Charter School #1166**

FINANCIAL STATEMENTS AND SUPPLEMENTARY INFORMATION
WITH INDEPENDENT AUDITORS' REPORTS

**June 30, 2023**

HORTON MCNULTY & SAETEURN, LLP

**Sherwood Montessori**
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June 30, 2023


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**INDEPENDENT AUDITORS' REPORT ON THE FINANCIAL STATEMENTS**

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, 2023; 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, 2023, 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.

**INDEPENDENT AUDITORS' REPORT ON THE FINANCIAL STATEMENTS**
(Continued)

### *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.

**INDEPENDENT AUDITORS' REPORT ON THE FINANCIAL STATEMENTS**
(Continued)

***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 December 29, 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

December 29, 2023
Chico, California

# FINANCIAL SECTION

## Sherwood Montessori

STATEMENT OF FINANCIAL POSITION

June 30, 2023

| | | |
|---|---|---|
| **ASSETS** | | |
| **Current Assets** | | |
| Cash and cash equivalents | $ | 782,900 |
| Due from federal government | | 38,850 |
| Due from state government | | 257,320 |
| Due from local governments | | 15,717 |
| Prepaid expenses | | 13,851 |
| **Total Current Assets** | | 1,108,638 |
| **Property and Equipment** | | |
| Net of accumulated depreciation | | 228,351 |
| **TOTAL ASSETS** | $ | 1,336,989 |
| **LIABILITIES AND NET ASSETS** | | |
| **Current Liabilities** | | |
| Accounts payable | $ | 2,590 |
| Accrued payroll and payroll liabilities | | 62,499 |
| Due to state government | | 208,073 |
| Due to local governments | | 1,803 |
| Advances from grantors | | 30,865 |
| **Total Liabilities** | | 305,830 |
| **Net Assets** | | |
| Without donor restrictions | | 1,006,145 |
| With donor restrictions | | 25,014 |
| **Total Net Assets** | | 1,031,159 |
| **TOTAL LIABILITIES AND NET ASSETS** | $ | 1,336,989 |

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

## Sherwood Montessori

STATEMENT OF ACTIVITIES

| Year Ended June 30, 2023 | Without Donor Restrictions | With Donor Restrictions | Total |
|---|---|---|---|
| **Revenue and Other Support** | | | |
| Local control funding formula sources | $ 1,034,725 | $ - | $ 1,034,725 |
| Federal revenue | - | 197,539 | 197,539 |
| State revenue | 502,867 | 429,944 | 932,811 |
| Contributions | 42,482 | - | 42,482 |
| Net assets released from restrictions | 744,946 | (744,946) | - |
| **Total Revenue and Other Support** | 2,325,020 | (117,463) | 2,207,557 |
| **Expenses** | | | |
| Program services: | | | |
| Instruction services | 1,068,921 | - | 1,068,921 |
| Instruction-related services | 157,412 | - | 157,412 |
| Pupil services | 134,033 | - | 134,033 |
| Ancillary services | 175,109 | - | 175,109 |
| Plant services | 118,247 | - | 118,247 |
| **Total Program Services** | 1,653,722 | - | 1,653,722 |
| Supporting services: | | | |
| General administration | 307,808 | - | 307,808 |
| **Total Expenses** | 1,961,530 | - | 1,961,530 |
| **Change in Net Assets** | 363,490 | (117,463) | 246,027 |
| **Net Assets - Beginning of Year** | 642,655 | 142,477 | 785,132 |
| **Net Assets - End of Year** | $ 1,006,145 | $ 25,014 | $ 1,031,159 |

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

## Sherwood Montessori

STATEMENT OF CASH FLOWS

Year Ended June 30, 2023

| | | |
|---|---|---|
| **CASH FLOWS FROM OPERATING ACTIVITIES** | | |
| Change in net assets | $ | 246,027 |
| Adjustments to reconcile change in net assets to net cash provided by operating activities: | | |
| Depreciation | | 9,126 |
| Changes in: | | |
| Accounts receivable | | 301 |
| Due from federal government | | (9,849) |
| Due from state government | | (105,644) |
| Due from local governments | | 23,987 |
| Prepaid expenses | | (13,851) |
| Accounts payable | | (5,603) |
| Accrued payroll and payroll liabilities | | (25,965) |
| Due to state government | | 85,189 |
| Due to local governments | | 618 |
| Advances from grantors | | 29,108 |
| **NET CASH PROVIDED BY OPERATING ACTIVITIES** | | 233,444 |
| **Cash and Cash Equivalents - Beginning of Year** | | 549,456 |
| **Cash and Cash Equivalents - End of Year** | $ | 782,900 |

*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.

***Implementation of New Accounting Standard*** The Charter School adopted the provisions of Accounting Standards Update (ASU) No. 2016-02, *Leases (Topic 842),* as of July 1, 2022. The ASU increases transparency and comparability among organizations by requiring lessees to recognize lease assets and lease liabilities on the statement of financial position for all leases with terms longer than 12 months and to disclose key information about leasing arrangements. Leases are classified as either finance or operating, with classification affecting the pattern of expense recognition in the statement of activities. Upon analysis of the Charter School's existing leases, it was determined that the resulting balances would be immaterial. As a result, the Charter School has not recognized any initial right-to-use lease assets or lease liabilities during the current period.

Upon adoption of this ASU, the Charter School elected to apply several practical expedients including: 1. Not reassessing existing contracts to determine whether they are or contain a lease; 2. Not reassessing existing leases to determine whether they are an operating or financing lease; and 3. Not reassessing any initial direct costs for existing leases.

***Basis of Accounting and Presentation*** The financial statements have been prepared on the accrual basis of accounting in accordance with accounting principles generally accepted in the United States of America. Net assets, revenues, and expenses are classified based on the existence or absence of stipulations imposed by donors or grantors. Accordingly, net assets of the Charter School, and changes therein, are classified and reported as follows:

*Net Assets Without Donor Restrictions:* Net assets that are not subject to stipulations imposed by donors or grantors and may be expended for any purpose in performing the primary objectives of the Charter School. These net assets may be used at the discretion of the Charter School's management and the board of directors.

*Net Assets With Donor Restrictions*: Net assets subject to stipulations imposed by donors and grantors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of the Charter School or by the passage of time. Other donor restrictions are perpetual in nature, whereby the donor has stipulated the funds be maintained in perpetuity.

Donor restricted contributions are reported as increases in net assets with donor restrictions. When a restriction expires, net assets are reclassified from net assets with donor restrictions to net assets without donor restrictions in the statements of activities. Donor contributions with a measurable performance barrier and a right of return are not recognized in the statement of activities until conditions on which they depend have been met.

***Cash and Cash Equivalents*** The Charter School considers all highly liquid investments with an initial maturity of three months or less to be cash and cash equivalents.

***Due From Federal, State, and Local Governments*** Amounts due from federal, state, and local governments include entitlements and grants from federal, state, and local governments that the Charter School has earned or been allocated, but has not received as of June 30, 2023. Management believes that all receivables are fully collectible.

***Prepaid Expenses*** Prepaid expenses consist of operating expenses for which payment is due in advance and are expensed when the benefit is received.

***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, 2023, were $8,262.

***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 December 29, 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, 2023 | | |
|---|---|---|
| Cash and cash equivalents | $ | 782,900 |
| Due from federal government | | 38,850 |
| Due from state government | | 257,320 |
| Due from local governments | | 15,717 |
| **Total Financial Assets** | $ | 1,094,787 |

Of this amount, $30,865 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, 2023 | | |
|---|---|---|
| Land | $ | 95,000 |
| Buildings and improvements | | 182,515 |
| **Subtotal** | | 277,515 |
| Less: Accumulated depreciation | | 49,164 |
| **Property and Equipment - Net** | $ | 228,351 |

Depreciation expense amounted to $9,126 for the year ended June 30, 2023.

## 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, and workers' compensation 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, 2023 | |
|---|---|
| Subject to expenditure for specified purpose: | |
| Program services: | |
| Learning Recovery Emergency Block Grant | $ 25,014 |

## 6. FUNCTIONAL EXPENSE ANALYSIS

The table below presents expenses by both their nature and their function for the fiscal year ended June 30, 2023.

| | Program Activities | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Year Ended June 30, 2023 | Instruction Services | Instruction-Related Services | Pupil Services | Ancillary Services | Plant Services | Program Subtotal | General Administration | Total Expenses |
| Certificated salaries | $ 630,818 | $ - | $ 67,201 | $ - | $ - | $ 698,019 | $ - | $ 698,019 |
| Classified salaries | 176,611 | 101,264 | 45,179 | 116,594 | - | 439,648 | 43,398 | 483,046 |
| Employee benefits | 191,176 | 47,894 | 21,368 | 55,145 | - | 315,583 | 20,527 | 336,110 |
| Books and supplies | 18,297 | - | 285 | 3,370 | 11,861 | 33,813 | 10,176 | 43,989 |
| Services and other operating | 42,893 | 8,254 | - | - | 106,386 | 157,533 | 233,707 | 391,240 |
| Depreciation | 9,126 | - | - | - | - | 9,126 | - | 9,126 |
| **Total Expenses** | $ 1,068,921 | $ 157,412 | $ 134,033 | $ 175,109 | $ 118,247 | $ 1,653,722 | $ 307,808 | $ 1,961,530 |

## 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.

## 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 and other pension information for the fiscal year ended June 30, 2022, the total pension liability for STRP was $369,542,000,000, fiduciary net position was $300,056,000,000, employer and state contributions totaled $11,077,141,449, 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 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 2022-23 was 19.10% 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, 2023, 2022, and 2021, were $107,645, $102,696, and $73,306, 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, 2023, the Charter School recognized pension expense of $58,881 and revenue of $58,881 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 and other pension information for the fiscal year ended June 30, 2022, the School Employer Pool total pension liability was $113,794,594,000, fiduciary net position was $79,385,509,000 employer contributions totaled $3,511,337,893, and the plan is 70% funded. The Charter School did not contribute more than 5% of the total contributions to the plan.

***Funding Policy*** Active plan members that meet the definition of a new member under the Public Employees' Pension Reform Act are required to contribute 8.00% 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 2022-23 fiscal year was 25.37%. 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, 2023, 2022, and 2021, were $48,637, $42,965, and $30,388, respectively, and equaled 100% of the required contributions for each year.

# OTHER SUPPLEMENTARY INFORMATION SECTION

# Sherwood Montessori

LOCAL EDUCATIONAL AGENCY ORGANIZATION STRUCTURE

June 30, 2023

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 | 2025 |
| Tina Hanson-Lewis | Vice Chair | 2025 |
| Dr. Beth Hammer | Treasurer | 2023 |
| Robyn Howley | Secretary | 2023 |
| Jolynn Aanenson | Member | 2025 |

## ADMINISTRATION

Michelle Yezbick
Director

Patrick Casey
Business Manager

## Sherwood Montessori

SCHEDULE OF AVERAGE DAILY ATTENDANCE

June 30, 2023

| | Originally Reported | | Final | |
|---|---|---|---|---|
| | Second Period Report | Annual Report | Second Period Report | Annual Report |
| **ELEMENTARY** | | | | |
| **Regular ADA** | | | | |
| Transitional kindergarten/kindergarten through grade 3 | 62.07 | 62.85 | 62.07 | 62.85 |
| Grades 4 through 6 | 25.16 | 25.00 | 25.16 | 25.00 |
| Grades 7 through 8 | 5.11 | 5.21 | 5.11 | 5.21 |
| **Classroom-Based ADA Totals** | 92.34 | 93.06 | 92.34 | 93.06 |

*See the accompanying note to the other supplementary information.*

## Sherwood Montessori

SCHEDULE OF INSTRUCTIONAL TIME

Year Ended June 30, 2023

| | 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, 2023; 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 December 29, 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

December 29, 2023
Chico, California

## INDEPENDENT AUDITORS' REPORT ON STATE COMPLIANCE AND ON INTERNAL CONTROL OVER COMPLIANCE FOR STATE PROGRAMS

To the Board of Directors
Sherwood Montessori
Chico, California

### Report on State Compliance

#### *Opinion on State Compliance*

We have audited Sherwood Montessori's (the Charter School) compliance with the requirements specified in the *2022-23 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*, published by the Education Audit Appeals Panel as prescribed by Title 5, *California Code of Regulations*, Section 19810, applicable to the Charter School's state program requirements identified below for the year ended June 30, 2023.

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 25 and 26 for the year ended June 30, 2023.

#### *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 *2022-23 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 COMPLIANCE FOR STATE PROGRAMS**
(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 compliance 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 *2022-23 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 *2022-23 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 *2022-23 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 COMPLIANCE FOR STATE PROGRAMS**
(Continued)

| June 30, 2023 | | 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. | Ratio 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 |
| TT. | Home to school transportation reimbursement | Not applicable |
| UU. | Independent study certification for ADA loss mitigation | 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) | No |
| CZ. | Career technical education incentive grant | No |
| EZ. | Transitional kindergarten | Yes |

| June 30, 2023 | | 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 UU. were not performed as they do not apply to charter schools.

Since the Charter School did not participate in the following programs during 2022-23, 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 2022-23 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 2022-23.

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 for expanded learning opportunities grant (ELO-G) (BZ) was not performed because the Charter School did not have any expenditures during 2022-23 from ELO-G funds. Testing was not performed for nonclassroom-based instruction/independent study (CC) for charter schools 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.

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

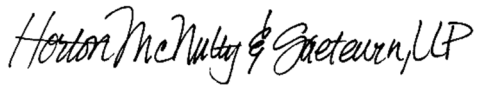
## Report on Internal Control Over Compliance for State Programs

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 *2022-23 Guide for Annual Audits of K-12 Local Education Agencies and State Compliance Reporting*. Accordingly, this report is not suitable for any other purpose.



December 29, 2023
Chico, California

# FINDINGS SECTION

None.

None.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** January 18, 2024

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*Instructional Staff were given the opportunity to write to the Board about anything they'd like.*

**Transitional Kindergarten/Kindergarten -Teresa Shippen**

January is always a time for reflection. After a busy holiday season, I am grateful for the week off in January. It allows me to reflect on the growth our students have made. What are our strengths? What areas need more work? I have been busy setting goals for my students, our class, and myself. Some of the students are ready to work on setting goals with me. Understanding the path and the next steps helps kids keep their focus, and feel a sense of control over their learning. Control is such a strong element in our room this year. We have some very independent kids that will do well working towards and achieving their goals. We often talk about how practice helps us master a new skill. This semester we will be working on practicing our skills and working towards our goals.

This January we welcomed a new TK student into our room. She has made a very smooth transition. The Montessori Sensorial work, and Practical Life work is a natural draw to curious children. She spent the better part of her first three days on these works, but by Friday was interested in the Language work she saw others using. It is so wonderful to have mixed age groups in our room! There are many helpers to guide her learning and help with the transition to our room.

This January we have also experienced the loss of our Aide, who has been a wonderful guide to our kids for two years. Her sudden departure left us all feeling a little off balance. (She is fine, just unable to finish the year with us.) We are thankful to have a very competent sub to fill her shoes and are actively trying to find a permanent replacement. This unexpected change has made our transition back to school a little rocky, but I am hopeful with the new hire that we will be able to find our way again.

This month our thoughts also turn to our enrollment for next year. Our goal has always been to maintain two Kindergarten classrooms. This ensures enough students matriculating through to first grade. Finding those students is the challenging part. It is time to start thinking of how we will advertise. What draws students to a Montessori education? Where and how will we reach the families that would be a good fit for our school? Last year we advertised at the preschools, hosted an Open House, and had a presence at the Farmer's Market. It is time to brainstorm

new and more ways to get the word out!

**Transitional Kindergarten/Kindergarten -Adam Mankoski**

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

It is 4:57 p.m. on Friday, January 12. I've completed a lot today. I have coordinated with a parent volunteer to have preparation completed on my behalf. I have wrapped up all lessons, collected all practice, retaught when necessary, and evaluated student work. I have supported a struggling student making trips to the office, working with my teaching partner, seeking support from wellness staff then my fellow teachers. I've reviewed the work of my teaching partner setting expectations and goals for the coming week. I've completed behavior documentation required for the observations made and processes followed. I've sent emails to parents and staff. I've been in meetings with parents and staff. I've collaborated and debriefed with my lower elementary teaching partner. And now, I'm writing a board report that was to be completed this afternoon, by the end of the day, around 3:30 p.m. It's really hard. Living a good life, doing meaningful work, building strong relationships, and putting forth one's best effort requires a lot. But I have learned that a life of freedom, fulfillment, and purpose comes from doing hard things. Therefore, I offer my students, the families I serve, and my colleagues opportunities to do those things that they can not do yet. To grow in all aspects of their lives. I believe that they, like me, may prefer hard work over giving up when I am uncomfortable, when I start to struggle, or when I feel unpleasant feelings. We are preparing and practicing not for ordinary lives but for the lives of our dreams. We are doing it together and we are celebrating our accomplishments as we go. I believe the first woman in Italy to be certified as a medical doctor, Maria Montessori, would approve. It's now 5:47 p.m.

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

Lately, I'm thinking about mixed messages—specifically, the mixed messages that Sherwood staff sends to its students by operating half within, and half outside, our stated philosophies and objectives.

Here are some examples:

- Some teachers and staff are walking through our exterior "hallways," insisting that students walk in those areas too because that's a school rule. While this is happening, other teachers and staff are watching students run, and not intervening at all.

- Some teachers tell students that they should never take "cuts" in the lunch line. Other teachers have felt comfortable walking up to a group of students and requesting that their whole class get "cuts" in front of another class.

- A teacher (citing the rules) says “no sweets at school.” Another teacher allows their whole class to eat cupcakes right in front of that teacher’s class. [Note: I’ve compromised by allowing families to bring sweets right at dismissal time, because I know that other teachers have allowed it and I don’t want to be the lone stickler—but if we agreed to be consistent, I would hold the line.]

- A teacher asks a delayed reader with an IEP to work methodically through one letter-sound card set each morning, and write each short list of words into his classroom work journal to earn a star on his punchcard. But when that student gets called over to the LC for intervention, the LC staff rejects these classroom materials and gives him different styles of worksheets instead, and invites him to earn stickers or food instead of punchcard progress. They further invite him to hide his prizes from his class and teacher in his backpack.

- Some teachers consistently tell their students that children and adults should work together as a team. Meanwhile, other teachers (and the school library) offer *Captain Underpants* books to read, where the entire series premise is two children manipulating and enslaving their school principal. Still other teachers invite all students to a movie screening that shows an abandoned child attempting to murder intruding adults. (Yes, it’s *Home Alone*. Classic, right? But think impartially for a moment about what behaviors and attitudes that movie models, and whether it matches our Family Handbook or our Peace Education objectives.)

- A teacher tells students that they have choice in *what* to read and write, but that they need to read and write *something* each day. Another teacher allows students to only practice these skills whenever they feel like it—which isn’t often enough for them to progress.

- One staff member shows students how to make bread dough, and emphasizes that the process of making this squishy substance has another purpose, because bread is edible. Other staff members remind students at various times that they shouldn’t make messes just for fun, and that they should use materials for their purpose. And yet when students spend time in counseling, a staff member teaches them to make “slime,” which is technically just a sensually satisfying form of toxic waste, and a misuse of materials that have another purpose.

I’m sure some people reading these examples would tell me, “Loosen up,” but if we all loosen up at the same time (which I think we’ve tried before) we already know it will result in chaos. So instead we have this duality: Some staff members are making intentional choices with Montessori missions and with whole-school harmony in mind, while others are making reactive compromises to win the moment and pander to children’s immediate instincts. They’re also making their colleagues’ job more difficult, and even worsening their own work space, because kids who receive too many mixed messages are harder for everyone to manage.

Though I’m reluctant to recount them, these are my current observations of the Sherwood

school environment. And in the spirit of what I tell my students, which is "Ask for what you want," I guess this is what I want:

- I want us to follow our published rules schoolwide. If that means editing the rules to match our existing practices, so be it, because I think it's very important that we make it match. However, I believe the rules that are already published are already a great framework to follow, and that we should just be more consistent as a staff in following them and reminding students to follow them.
- I want to work with colleagues who share my values, which I believe are also the legacy values of Montessori practice. I don't want to make it up as we go along, or try to meet halfway when I'd have to leap a philosophical chasm to do so. I don't want to have to explain or defend my reasoning very often; I'd rather be on the same page.
- I want students' observable activities on our campus to (mostly) meet our shared vision for human attitudes and behavior. Obviously they're children and they don't have to be perfect, but I'd like for our student cohort to embody positive values with calm, well-adjusted behavior including campus rule-following. When they don't, I'd like to see all colleagues taking equal turns reminding them.

**4th /5th/6th -Jessi Lusardi**

I would like to express two things–one, that I would like to invite you to come in to observe classes when you can. And two, that I would like to again advocate for an aide in both upper elementary classrooms for next school year. Aides in the upper elementary level are largely utilized for academic help. Currently I have 19 students in my class, 6 of which need interventions in class and are on an SST or 504, 3 have an IEP, and 2 are being evaluated for an IEP. An aide would help these students to access the curriculum, and help their reading and math levels progress.

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

Room 5 is having a wonderful start to the new year. Students returned from the Winter break and got back into the flow of our daily routine. Our first circle of the year was a bit squirrelly, but they were ready to get to work. Students have been enjoying working collaboratively on writing prompts and math assignments. Today we released the Chinook salmon fry we had been raising since November, when the eggs were delivered to our class. It was cold and lovely at Riverbend Park. A sixth grader and a fourth grader teamed up to run the release while I stood by and took pictures. My students are amazing!

**7th/8th Michael Whittemore**

**7th/8th-Stacy Gertz**

Happy New Year! I'm super excited to be taking on some new roles here at Sherwood. I have been working with reading remediation K-12 (varying by year) since the early 90s. I utilized the break to self-train with assessing and strategizing with the Montessori Pathways Program.

In addition, I will be taking on some more content areas in our middle school classroom. I am facing some expected challenges in terms of teaching style. I tend to be a bit more structured and hold accountability a little more than some of our students are used to. It has been an honor and a privilege to work alongside with Michael. His teaching style is so dynamic with our students. We both have shared that we are learning a lot from one another.

I plan to individualize more as the year progresses. At this point, it is safe to say that I have a clear perspective on our students' aptitudes. This being said, we plan to challenge some; which may include more work or higher expectations and, at the same time, be sure that our students are fully supported that need extra time and reinforcement.

What I love about Sherwood is that it is extremely student-centered. The collaboration from co-teachers, counselors and administration is more than I have seen in most venues! I am confident that we will have an exciting second half of the year based on projects, fundraisers, field trips and consistent, sequential lessons tailored to our students' needs and state standards.

As recently as today, I have shared with our students that they have a voice. I encourage them to communicate their wants and needs, and to share privately or together any questions or concerns with someone that they are comfortable with.

Thank you for allowing us to have a voice!

**Learning Center-Leslie Carey**

My instructional board report will be things I have learned so far about Montessori Education. Before coming to this school I knew very little about the Montessori Method. I haven't had formal Montessori training yet, but I have observed some unique Montessori techniques.

The classrooms are filled with multi-aged children. There are many benefits that I've observed from this, one being that the younger students can have mentors. Another benefit is that older students can be leaders. The Montessori classroom has a very different feel to it than any other classroom I've observed. In the Montessori classroom, the students feel more like a team, and help one another with their work.

Another great thing about Montessori education is that it's child directed. There is a lot of choice, which promotes independence. For example, teachers have work expectations such as a writing prompt but there are different choices on what the writing prompt can be about.

One more thing I've observed from working at Sherwood Montessori, is that Montessori education has a large focus on social emotional learning. Academics are equally important to a child's self-esteem and social skills. Each of our classrooms have some kind of calm corner and each teacher uses different strategies to make their students feel safe. This is so important because students can't learn if they don't feel safe and loved. I look forward to learning much more about Montessori education.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** January 18, 2024

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**Administrative**

- Updated enrollment will be reported at the meeting.
- We are currently seeking a morning instructional aide to cover before school care through the end of lunch/recess. This position supports the kindergarten classes between morning care and lunch/recess.
- We were awarded a $40,000 grant for technology through the County Office of Education. The origin of the funds was from a settlement with the Microsoft Corporation.
- CUSD has sent the attached letter documenting that they will go forward with writing an offer for our use of classrooms at Chapman and we should receive the offer by April 1.

**Legislative**

- The state budget deficit was not as significant as projected, and the State Superintendent of Schools, Tony Thurmond, issued a press release commending Governor Newson for preserving schools in the draft of the State Budget.

**Community & Promotion**

- I will be starting Coffee with the Director mornings beginning in February to give parents another opportunity to give input about the school.
- The Board meeting will be happening the night after Open House, and I will be able to share how Open House went at the meeting.
- Our mosaic medallion that was created with grant funds from the North Valley Community Foundation and matched funds from the Rainforest Art Project will be installed on the morning of February 14th. We are hoping for media presence at the event, and local news has expressed interest.

Attachment: Prop 39 Letter from CUSD Facilities

**Administrative Offices**
1163 E. Seventh Street
Chico, CA 95928-5999

530 / 891-3000
fax: 891-3220
www.ChicoUSD.org

**Facilities Department**
2455 Carmichael Drive
Chico, CA 95928

(530) 891-3209
Fax:(530) 891-3190

**VIA ELECTRONIC AND CERTIFIED MAIL**

Ms. Michelle Yezbick, School Director
Sherwood Montessori
1010 Cleveland Avenue
Chico, CA 95928

January 11, 2024

Re: Use of Chico Unified School District Facilities in 2024/25

Dear Ms. Yezbick:

This letter responds to Sherwood Montessori's request for facilities under Proposition 39 for 2024-2025. The parties confirm that they are willing to waive the procedural requirements of Proposition 39 and its implementing regulations (Title 5 California Code of Regulations Section 11969.9.), and proceed directly to an issuance of a Final Offer of facilities containing the facilities currently occupied by the Charter School, namely, the continued shared use of CUSD facilities at Chapman Elementary School, 1071 East 16th Street, Chico, CA 95928 for its Grades K-8 program, as set forth in the In lieu of Proposition 39 Agreement for the 2023-2024 school year. We will send a Final Offer no later than April 1, 2024, as well as a proposed Facility Use Agreement, under separate cover.

Sincerely,

Julie Kistle
Director, Facilities and Construction

I agree to the above-stated terms and represent that I have the authority to enter this agreement and bind Sherwood Montessori Charter School and its governing board.

January __, 2024 _____

Michelle Yezbick, School Director
Sherwood Montessori

cc: Jaclyn Kruger, Assistant Superintendent, Business Services
Tina Keene, Director, State and Federal Programs
Kelly Staley, Superintendent

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

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

**Date:** January 18, 2024, Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of December 2023 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 697,855 as of December 31,2023 for the checking account.
- The expenses in December were for the normal operating cost.

Profit & Loss

The December 2023 Profit & Loss report shows a Net Income of $ -297,848, which was offset by $ 48,818 LCF funds deposited in January 2024 along with $ 71,176 EPA, $8,211 ELOP and $6,347 Lottery funds. The actual Net Income for December 2023 is $ -163,296.

- Cash Flow
  The school should end the year with a positive cash balance assuming the final ADA is greater than 95 and state revenues are not significantly reduced. The Legislative Analyst's Office is projecting a $38B deficit for 2022 and 2023 tax collections. This may result in a call back of funds received in 2022-23 and a reduction in 2023-24 apportionment. Estimated amounts will not be known until January-February 2024.

# Sherwood Montessori
## Profit & Loss YTD Comparison
July through December 2023

| | Jul - Dec 23 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | |
| **8010-8099 Revenue Limit Sources** | 375,448 |
| **8110-8290 Federal Revenues** | 27,588 |
| **8300-8599 Other State Revenue** | 146,474 |
| **8600-8799 Other Local Revenue** | 28,138 |
| **Total 8000-Revenues** | 577,648 |
| **Total Income** | 577,648 |
| **Gross Profit** | 577,648 |
| **Expense** | |
| **1000 Certificated Salaries** | 272,002 |
| **2000 Classified Salaries** | 226,924 |
| **3000-Employee Benefits** | 165,284 |
| **4000-Books and Supplies** | 24,396 |
| **5000 Services/Other Op. Exp.** | 186,850 |
| **Do Not Use This One** | 40 |
| **Total Expense** | 875,497 |
| **Net Ordinary Income** | -297,848 |
| **Net Income** | **-297,848** |

**Sherwood Montessori**
**Board of Directors - Vendor Payments Report**
**December 2023**

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 12/01/2023 | ACH | CharterSAFE | BILLED PREMIUM - LIABILI... | 5400-Liability Insurance | 3,129.00 |
| Check | 12/01/2023 | ACH | CharterSAFE | BILLED PREMIUM - WC 20... | 3601-Workers Comp | 1,488.00 |
| Check | 12/01/2023 | 9773 | Chico Country Day | NURSE CONTRACT INV 24... | Contracted Service | 1,298.71 |
| Check | 12/01/2023 | EFT | Comcast 4454 | SERVICE - 2023 DEC | Internet Service Provider | 468.06 |
| Check | 12/01/2023 | DBT | Craigslist | JOB AD | Advertising | 20.00 |
| Check | 12/01/2023 | ACH | Macquarie Equipment Capit... | Kyocera Copier Lease 2023 ... | Copier Lease | 223.00 |
| Check | 12/04/2023 | 9774 | Advanced Document | MONTHLY SERVICE - 2023 ... | Copier Lease | 939.16 |
| Check | 12/04/2023 | 9776 | Hernandez Cleaning Service | SERVICE 2023 NOV | Housekeeping Services | 3,680.00 |
| Check | 12/04/2023 | 9777 | CUSD | FUA INV24-00062 2023 NOV | CUSD FUA Charges | 1,868.57 |
| Check | 12/04/2023 | DBT | Amazon.com | LIBRARY LABELS | Instructional Supplies | 5.40 |
| Check | 12/04/2023 | DBT | Amazon.com | JINGLE BELLS | Instructional Supplies | 6.48 |
| Check | 12/04/2023 | DBT | NCS Pearson INC. | SPEC ED TESTING MATER... | Instructional Supplies | 14.00 |
| Check | 12/05/2023 | 9775 | Barney James Kerr | HOURS 9.5 X 33.00 LCAP F... | Contracted Service | 313.50 |
| Check | 12/06/2023 | DBT | LA COCINA | PBIS - SUMS MTSS - LCAP ... | LCAP | 56.60 |
| Check | 12/07/2023 | 9779 | Chico Country Day | NURSE CONTRACT INV 25... | Contracted Service | 1,298.71 |
| Check | 12/07/2023 | DBT | Amazon.com | JINGLE BELLS | Instructional Supplies | 23.80 |
| Check | 12/07/2023 | DBT | Amazon.com | JINGLE BELS | Instructional Supplies | 23.82 |
| Check | 12/08/2023 | 9780 | Royal Aire Inc. | AC MAINTENANCE TUNE-... | Contracted Service | 1,454.00 |
| Check | 12/08/2023 | 9778 | City of Chico | SERVICE - 2023 NOV | Sewer | 28.87 |
| Check | 12/08/2023 | EFT | California Water Service C... | SERVICE 2023 NOV | Water | 28.31 |
| Check | 12/08/2023 | EFT | Waste Management | SERVICE - 2023 NOV | Trash/Recycling | 140.44 |
| Check | 12/08/2023 | DBT | Amazon.com | PE LCAP GOAL PLAYGRO... | PE | 82.21 |
| Check | 12/08/2023 | DBT | Safeway | FOOD SUPPLIES | Food (Instructional) | 40.74 |
| Check | 12/08/2023 | DBT | Amazon.com | GENRE STICKERS | Instructional Supplies | 27.48 |
| Check | 12/11/2023 | DBT | Amazon.com | BLINK CAMERAS | Computers and Electronics | 100.00 |
| Check | 12/12/2023 | EFT | Directional Ad-Vantage Hol... | CHICO MALL KIOSK - 2023 ... | Advertising | 295.00 |
| Check | 12/12/2023 | DBT | Amazon.com | NR | Instructional Supplies | 13.74 |
| Check | 12/13/2023 | DBT | Costco | SNACKS | Extended Day | 345.65 |
| Check | 12/13/2023 | ACH | COSTCO VISA CARD | THRU 15TH PURCHASES 2... | SHERWOOD COSTCO VISA | 3,923.58 |
| Check | 12/14/2023 | 9781 | Adam Mankoski | SUPPLIES | Instructional Supplies | 35.48 |
| Check | 12/19/2023 | 7542 | Noel Bjerk | LIVESCAN REIMB | LiveScan and TB Test Servi... | 66.00 |
| Check | 12/19/2023 | 7543 | Bailey Hunn | LIVESCAN REIMB | LiveScan and TB Test Servi... | 66.00 |
| Check | 12/19/2023 | DBT | Wufoo | SERVICE - 2023 DEC-JAN 24 | Online List Management | 19.00 |
| Check | 12/19/2023 | DBT | Great Harvest Bread Co. | LUNCH MEETING PBIS LC... | Food - Meetings | 54.84 |
| Check | 12/20/2023 | 7544 | Carla Lopez-Mercado | DONATION - intern contract | Contracted Service | 1,269.00 |
| Check | 12/20/2023 | 7545 | Paula Gomes Barroso | DONATION - intern contract | Contracted Service | 2,700.00 |
| Check | 12/20/2023 | 7546 | Laura Swanson | BH SUPPLIES - beads,mat,s... | Instructional Supplies | 76.58 |
| Check | 12/20/2023 | DBT | Office Depot | ENVELOPES | Office Supplies | 61.15 |
| Check | 12/21/2023 | 9782 | CALIFORNIA STATE UNIV... | Paid intern INV-012913 KEVI... | Contracted Service | 750.00 |
| Check | 12/21/2023 | 9783 | Hernandez Cleaning Service | SERVICE 2023 DEC | Housekeeping Services | 3,450.00 |
| Check | 12/21/2023 | EFT | PG & E | SERVICE - 2023 DECEMBER | Electricity | 745.90 |
| Check | 12/21/2023 | EFT | Comcast Business 9110 | SERVICE - 2023 DEC-JAN | Telephone, Landline | 184.29 |
| Check | 12/22/2023 | DBT | USPS | MAILINGS | Postage | 5.40 |
| Check | 12/26/2023 | DBT | Amazon.com | PRIME MO DUES - 2023 DEC | 5300-Dues and Membership | 16.23 |
| Check | 12/26/2023 | ACH | Verizon Wireless | SERVICE 2023 DECEMBER | Telephone, Cellular | 94.54 |
| Bill | 12/31/2023 | INV 20... | Pat Casey | CONTRACTED SERVICE 2... | Business Manager Services | 4,700.00 |
| **TOTAL** | | | | | | **35,631.24** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Purchasing Policy Update**

**Date**: January 18, 2024

---

**SUMMARY**

The Purchasing Policy needs updating.

**DISCUSSION**

The Purchasing Policy was last updated in 2016. The suggested revisions reflect current practices and auditor's recommendations.

**ACTION REQUESTED**

Approve policy revisions.

Attachment: Draft of Revised Purchasing Policy

SHERWOOD MONTESSORI

# Purchasing Policy

Sherwood Montessori will maintain in effect the following principles in its ongoing fiscal management practices to ensure that (1) expenditures are authorized by and in accord with amounts specified in the Board-adopted budget, (2) the school's funds are managed and held in a manner that provides a high degree of protection of the school's assets, and (3) all transactions are recorded and documented in an appropriate manner.

**Segregation of Duties**

Sherwood Montessori will develop and maintain simple check request and purchase order forms to document the authorization of all non-payroll expenditures. All proposed expenditures must be approved by the School Director who will review the proposed expenditure to determine whether it is consistent with the Board-adopted budget and sign the check request form. ~~All check requests and purchase orders over $500 must be co-signed by the Director and countersigned by one Board member, preferably the Treasurer, to ensure separation of expenditure authorization and check signing functions.~~ Ongoing, regular invoices, such as utilities, can be pre-approved on an annual basis by the School Director as sanctioned by the Board.

All transactions will be posted in an electronic general ledger. To ensure segregation of recording and authorization, the bookkeeper may not co-sign check requests for purchase orders.

**Budget Transfers**

The Director may transfer up to $2,000 from one unrestricted budget item to another without board approval. ~~, but shall notify the Board of the transfer at the next regularly scheduled meeting.~~

In the case of services for students with Individual Education Plans (IEPs), the Director shall have the authority to immediately transfer money to budget items needed to be compliant with IEPs~~,~~ and shall notify the Board of the transfer at the next regularly scheduled meeting.

**Banking Arrangements**

Sherwood Montessori will maintain its accounts in a federally insured commercial bank or credit union. Funds will be deposited in non-speculative accounts including federally-insured savings or checking accounts.

The School's bookkeeper will reconcile the school's ledger(s) with its bank accounts on a monthly basis and prepare (1) a balance sheet, (2) a comparison of budgeted to actual revenues and expenditures to date, and (3) a cash flow statement. The School Director and Finance Committee of the Board will regularly review these statements. The School will deposit all funds received as soon as practical upon receipt. ~~A petty cash fund, not to exceed $100, may be established with an appropriate ledger to be reconciled twice monthly by the school site Office Assistant, who shall not be authorized to expend petty cash.~~

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All funds received shall be deposited or transferred into the school's accounts at the earliest possible convenience and in no event later than 48 hours after receipt.

**Purchasing Procedures**

Payments will be signed by the Treasurer of the Board or other signatories on the bank account.

**Record Keeping**

Transaction ledgers, canceled/duplicate checks, attendance and entitlement records, payroll records, and any other necessary fiscal documents will be maintained by school staff in a secure location for at least three years, or as long as required by applicable law, whichever is longer. Appropriate back-up copies of electronic and paper documentation, including financial and attendance accounting data, will be regularly prepared and stored in a secure off-site location, separate from the school.

**Property Inventory**

The School Director shall establish and maintain an inventory of all non-consumable goods and equipment worth over $1,000. In addition, sensitive items including, but not limited to, computers, cellular phones, calculators, etc., shall also be inventoried. This inventory shall include the original purchase price and date, a brief description, serial numbers, percentage (if any) of federal participation in the cost of the property, and other information appropriate for documenting the school's assets. This property will be inventoried on an annual basis and lists of any missing property shall be presented to the Board. Adequate maintenance procedures shall be developed and tracked in the property records.

All non-consumable school property lent to students shall be returned to the school no later than 5 working days after end of the school year.

Any excess or surplus property owned by the school may be sold or auctioned by the School Director provided the School Director engages in due diligence to maximize the value of the sale or auction to the school. The sale or auction of property owned by the school with a fair market value in excess of $1,000 shall be approved in advance by the Board.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Travel Policy Update**

**Date**: January 18, 2024

---

**SUMMARY**

The Travel Policy needs updating.

**DISCUSSION**

The Travel Policy was written in 2010 and includes reference to rates that fluctuate over time. The revised version refers the reader to source documents from the IRS rather than including outdated amounts that will change again.

**ACTION REQUESTED**

Approve policy revisions.

Attachment: Draft of Revised Travel Policy

SHERWOOD MONTESSORI

# Travel Policy

This Travel Policy for Sherwood Montessori coincides as nearly as possible to State of California policies, as outlined by the California Administrative Code and State Administrative Manual.

**KEY POINTS**

- All travel requires advance approval from the Director;
- A Request for Payment must be submitted to obtain reimbursement;
- All reimbursements **must include** an itemized receipt, including hotel bills;
- Sherwood Montessori will pay lodging and per diem on approved business;
- Travelers may request an advance of 80% of estimated costs;
- In most cases, Sherwood Montessori prefers if the traveler pays the costs and submits receipts for reimbursement. However, pre-payment may be arranged upon consultation with the Director;
- Sherwood Montessori will strive to reimburse the traveler quickly;
- Any advance not cleared within 60 days of the trip's completion will become taxable income to the traveler, and no new advances will be issued to any project personnel until all outstanding advances have been cleared for the requesting individual on that project/account.

## I. SUBSISTENCE ALLOWANCES

Internal Revenue Code (IRC) 162(a) states that meal expenses, reimbursed by an employer to an employee, for travel away from home for less than 24 hours, where no overnight stay is required, represent taxable and reportable income; therefore, Sherwood Montessori will not reimburse for any meals on trips lasting less than 24 hours.

Sherwood Montessori has adopted the High-Low per diem rates established by the IRS which allow reimbursement for meals and incidental expenses (M&IE) ~~at $52 per day~~ to all locations in the US. For some high-cost locations, the maximum reimbursement is ~~$65~~higher per day for M&IE. Please check with the Director for the current high cost locations which will be based on the IRS recommendations ~~(IRS Table 2).~~. The meal expense must be incurred to be reimbursed. If a conference/training session is attended where meals are provided, per diem should not be claimed for the provided meals. However, if a provided meal was not consumed, a purchased one up to the amount of per diem for the meal may be claimed. Itemized receipts are necessary for lodging and other business expenses (see Travel Advance Request and Claim Instructions).

~~If the~~A traveler ~~chooses~~may choose a flat per diem over actual costs, the ~~rate is $40 per day of domestic travel; or $35 per day for travel over 30 days.~~Director will set the allowance to current IRS rates. This policy allows for the purchase of groceries over purchased meals, which will result in a savings to Sherwood Montessori. It also may be used for situations where receipts are not available. However, should meals be provided during travel, the rate shall be reduced accordingly. ~~Please check with the Director for the current per meal rates.~~

*Incidentals*

An "incidentals" allowance of $5 per 24-hour period may be claimed. This is intended to cover items such as non-food tips (i.e., bellman, valet, sky-cap), tax and personal expenses such as telephone calls home, laundry and newspapers. This $5 allowance will be reimbursed without receipts.

*Lodging*

Lodging will be reimbursed for reasonable **actual** costs including taxes up to the local limit as published by the IRS. All lodging reimbursements require a receipt from a commercial lodging establishment such as a hotel, motel, bed and breakfast inn, or public campground that caters to the general public. No lodging will be reimbursed without a valid receipt. Employees who stay with friends or relatives are not eligible for lodging reimbursement, but may claim their actual expenses for meals and incidentals. The original receipt should clearly show the name of person paying the bill, name of the traveler(s), amount of the bill, itemization of charges, dates and establishment name. If the lodging bill includes phone charges, make a note if they are personal or business and enter business calls under "business expense" on the travel expense claim.

*Use of a third party vendor (i.e., Priceline.com, Travelocity.com, Hotels.com, etc.)*

Be aware that some reporting may require separate itemized receipting of airfare and lodging. If this is the case, third-party vendors should not be used as it is often difficult to get an itemized receipt from the hotel.

In the rare event where an employee chooses to use a third party vendor to make travel arrangements, the following instructions must be strictly adhered to:

1. Employees who request reimbursement for receipts from third party vendors for air and lodging expenses incurred while traveling on Sherwood Montessori business must provide a valid receipt from the third party vendor and attempt to obtain a receipt from the lodging establishment showing check-in and check-out dates.
2. An itinerary must be obtained showing the airline travel.

Employees should also be aware that some third party vendors do not provide refunds for cancelled trips; employees are responsible for any and all charges that are associated with a cancelled or changed reservation when booking through a third party vendor.

## II. USE OF NON-COMMERCIAL SUBSISTENCE FACILITIES

Use of non-commercial subsistence facilities (i.e., house trailers, campgrounds, camping equipment) can be reimbursed at a rate up to $68 per day for each 12-24 hour period and $34 for each period less than 12 hours.

## III. FOREIGN TRAVEL

All foreign travel requires approval form the Director at least 30 days prior to travel. Students are not allowed to travel to countries listed as a war risk or high hazardous.

Foreign travel frequently consists of both business and personal components. Per the IRS (IRC Sec. 274(c)), there is a taxability issue if BOTH of the following conditions are met:

1. The total period of the trip is longer than one week, *and*
2. At least 25% of the trip is personal

As a result, reimbursement and advances for airfare and other expenses on Sherwood Montessori travel claims meeting both conditions will be reduced for the percentage of personal time. This requirement applies to travel outside the 50 United States and the District of Columbia. For the purposes of calculating the percentage of business and personal time when a travel day consists of both business and personal time, the day would be classified as a business day.

*Per Diem Rates*

For foreign travel, Sherwood Montessori uses the U.S. Department of State Foreign Per Diem rates. Foreign Per Diem rates are established monthly by the Office of Allowances as maximum U.S. dollar rates for reimbursement of government civilians traveling on official business in foreign areas. Please contact the Director for current foreign rates.

*Foreign Travel Insurance Program*

Foreign travel insurance is required for individuals traveling on Sherwood Montessori business. It is incumbent upon the traveler to procure appropriate insurance.

## IV. TRANSPORTATION EXPENSE

*Scheduling Airlines*

E- Tickets are reimbursable with the original E-ticket Itinerary/Confirmation Sheet, which states the dates of travel, destination and departure cities, the price of the ticket and that it has been paid by the claimant. If the amount or payment information is not on this confirmation sheet, proof of price and payment needs to be shown via a cancelled check or a credit card statement. When using E-Tickets, proof of travel is also required for reimbursement. The following will constitute appropriate proof: the boarding pass stub, if provided, which shows the travel dates, departure and destination cities, or lodging/meals or other receipts from an establishment located at the trip destination.

Sherwood Montessori will pay the cost of one checked bag. Any additional cost of bags is to be borne by the traveler, unless a justification is submitted explaining why the traveler paid for extra luggage (such as presentation handouts, exhibits, workshop materials, etc.) and can demonstrate that the additional cost was required to conduct Sherwood Montessori business.

Travel Agency Fees will be paid; however, a copy of the Travel Agent's Itinerary Sheet/Invoice which shows the amount of the processing fee must be turned in with the travel claim.

*Reimbursement for use of Private Automobile*

Reimbursement for use of private automobiles on official Sherwood Montessori business will be at the current IRS rate. This rate is subject to change by the IRS. Please contact the Director for current rates.

Expenses arising from travel between residence and place of employment are not allowed. When a trip commences or terminates at the claimant's residence, the distance traveled should be computed from either the school or residence, whichever results in the lesser distance. The exception to this is when the travel commences or terminates before or after the regularly scheduled work day or on a regularly scheduled day off; in this case distance may be computed from the claimant's residence.

*Requirements for use of Private Vehicles*

For insurance and liability issues, Sherwood Montessori must document that all individuals who drive vehicles for the school hold a valid driver's license and, in cases where a personal

vehicle is involved, proof of automobile liability insurance on the car. This requirement applies to all individuals, employees or volunteers, who drive either as a required part of their position requirements, or as an incidental driver.

*Vehicle Rental*

Sherwood Montessori will reimburse for the actual cost of vehicle rental for out-of-town travel, including gasoline costs with the submission of original receipts. Reservations for vehicles may be made by the individual or the school. All rentals require the purchase of additional automobile liability insurance or the Loss Damage Waiver. Renters will need to provide credit card information at the time of pick up.

*Out-Of-Town Vehicle Rentals*

Sherwood Montessori will reimburse actual costs for any out-of-town vehicle rental including gasoline costs with submission of original itemized receipts.

*Other Transportation (Motorcycle, ~~Bicycle~~Train, Bus, etc.)*

~~1. Bicycle. Where a privately owned bicycle is used in the conduct of official Foundation business, the employee will be allowed to claim **4 cents per mile.**~~

1. Bus. Actual cost of fare shall be reimbursed. Verification of cost shall be determined by a receipt, or if a receipt is not available the cost of the route will be determined by the transportation agency's posted schedules and fares.

2. Motorcycle. Motorcycle travel will be reimbursed at the same rate as vehicle travel.

~~2.~~3. Railroad/Subway/Trolley. No more than **actual fare** shall be allowed on any transportation service, in accordance with the latest tariffs at the time the trip was made. Special rates and roundtrip rates should be used whenever possible.

a. Reimbursement for roomette accommodations will be allowed. Where it is necessary to use Pullman accommodations that are more expensive than a roomette, a full explanation stating the facts constituting the official necessity must accompany the expense account together with a receipted voucher;
b. Unused portions of railroad and sleeping car tickets are subject to refunds, and all steps necessary to secure refunds on such tickets must be taken;
c. Meals incurred while on overnight train travel will be reimbursed in accordance with standard per diem rates for in-state and out-of-state short-term per diem.

**REQUIRED RECEIPTS**

| | |
|---|---|
| Airfare | Required |
| Lodging | Required |
| Car rental | Required |
| Gasoline for car rental or emergency use for University bus | Required |
| Conference registration fees | Required |
| Railroad, bus, light rail fares Taxi, shuttle, parking | Required if any one instance is greater than $10 |
| Telephone, fax, Internet | Required if any one instance is greater than $10 |
| Meals | Required if claiming up to full per diem |

| | |
|---|---|
| Miscellaneous business expenses | Required |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **SARC Draft Approval**

**Date**: January 18, 2024

---

**SUMMARY**

The Board is asked to approve Sherwood's draft SARC for 2022-2023.

**DISCUSSION**

Proposition 98 (passed in November 1988) and subsequent legislation require California public schools to provide information about themselves to the community in the form of an annual School Accountability Report Card or SARC. These report cards provide a variety of data to allow the public to evaluate and compare schools in terms of student achievement, environment, resources, and demographics. Much of the report comes with data pre-filled from the California Department of Education (CDE), and in some cases, such as the average class size element, the form is not a good fit with our school model.

The SARC will be available to the public at individual school sites and via the school website on February 1, 2024 and at the website: www.cde.ca.gov/ope/sarc/

**ACTION REQUESTED**

Approve SARC draft.

Attachment: Draft of SARC

# Sherwood Montessori

## 2022-2023 School Accountability Report Card
## (Published During the 2023-2024 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. |
|---|---|

## 2023-24 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 |

## 2023-24 District Contact Information

| | |
|---|---|
| **District Name** | Sherwood Montessori |
| **Phone Number** | 530-345-6600 |
| **Superintendent** | Michelle Yezbick |
| **Email Address** | michelle@sherwoodmontessori.org |
| **District Website** | www.sherwoodmontessori.org |

## 2023-24 School Description and Mission Statement

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

### 2022-23 Student Enrollment by Grade Level

| Grade Level | Number of Students |
|---|---|
| **Kindergarten** | 23 |
| **Grade 1** | 8 |
| **Grade 2** | 11 |
| **Grade 3** | 24 |
| **Grade 4** | 9 |
| **Grade 5** | 11 |
| **Grade 6** | 7 |
| **Grade 7** | 4 |
| **Grade 8** | 1 |
| **Total Enrollment** | 98 |

### 2022-23 Student Enrollment by Student Group

| Student Group | Percent of Total Enrollment |
|---|---|
| **Female** | 43.9% |
| **Male** | 56.1% |
| **American Indian or Alaska Native** | 2% |
| **Asian** | 3.1% |
| **Black or African American** | 5.1% |
| **Hispanic or Latino** | 14.3% |
| **Two or More Races** | 22.4% |
| **White** | 53.1% |
| **English Learners** | 5.1% |
| **Foster Youth** | 4.1% |
| **Homeless** | 9.2% |
| **Socioeconomically Disadvantaged** | 43.9% |
| **Students with Disabilities** | 22.4% |

## 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)** | 6.20 | 78.35 | 623.30 | 86.19 | 234405.20 | 84.00 |
| **Intern Credential Holders Properly Assigned** | 1.00 | 12.52 | 10.90 | 1.51 | 4853.00 | 1.74 |
| **Teachers Without Credentials and Misassignments ("ineffective" under ESSA)** | 0.40 | 5.01 | 13.40 | 1.86 | 12001.50 | 4.30 |
| **Credentialed Teachers Assigned Out-of-Field ("out-of-field" under ESSA)** | 0.00 | 0.00 | 25.50 | 3.53 | 11953.10 | 4.28 |
| **Unknown** | 0.30 | 4.13 | 49.90 | 6.91 | 15831.90 | 5.67 |
| **Total Teaching Positions** | 7.90 | 100.00 | 723.20 | 100.00 | 279044.80 | 100.00 |

The CDE published the first year of available teacher data for the 2020-21 SARC in June 2022, and the CDE published the second year of data for the 2021-22 SARC in June 2023. The EC Section 33126(b)(5) requires the most recent three years of teacher data to be requested in the SARC, as data is available. The teacher data for the 2022-23 SARC will not be available prior to February 1, 2024, and therefore is not included in the template.

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 | 0.00 |
| **Misassignments** | 1.50 | 0.40 |
| **Vacant Positions** | 0.00 | 0.00 |
| **Total Teachers Without Credentials and Misassignments** | 1.50 | 0.40 |

The teacher data for the 2022-23 SARC will not be available prior to February 1, 2024, and therefore is not included in the template.

## 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 | 0.00 |
| **Local Assignment Options** | 0.00 | 0.00 |
| **Total Out-of-Field Teachers** | 0.00 | 0.00 |

The teacher data for the 2022-23 SARC will not be available prior to February 1, 2024, and therefore is not included in the template.

## 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 | 28.5 |
| **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 | 0 |

The teacher data for the 2022-23 SARC will not be available prior to February 1, 2024, and therefore is not included in the template.

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

## 2023-24 Quality, Currency, Availability of Textbooks and Other Instructional Materials

| | |
|---|---|
| **Year and month in which the data were collected** | January 2024 |

| Subject | Textbooks and Other Instructional Materials/year of Adoption | From Most Recent Adoption ? | Percent Students Lacking Own Assigned Copy |
|---|---|---|---|
| **Reading/Language Arts** | Traditional Montessori materials<br>Reading A to Z<br>Montessori Reading Pathways | Yes | 0.0 |

| | | | |
|---|---|---|---|
| | | | |
| **Mathematics** | Traditional Montessori materials<br>Go Math grades 4-6<br>California College Preparatory Mathematics (CPM) grades 6-8<br>IXL grades 1-6 | Yes | 0.0 |
| **Science** | Traditional Montessori Materials<br>The California Education and the Environment Initiative (EEI) Curriculum grades 4-6<br>Waseca Biomes Curriculum grades 1-6<br>TCI grades 7-8 | Yes | 0.0 |
| **History-Social Science** | Traditional Montessori Materials<br>TCI grades 7-8 | Yes | 0.0 |
| **Foreign Language** | Spanish materials, dictionaries & Duolingo application | Yes | 0.0 |
| **Health** | Traditional Montessori Materials<br>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 six 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** | 1/2024 |

| System Inspected | Rate Good | Rate Fair | Rate Poor | Repair Needed and Action Taken or Planned |
|---|---|---|---|---|
| **Systems:**<br>Gas Leaks, Mechanical/HVAC, Sewer | X | | | |
| **Interior:**<br>Interior Surfaces | X | | | |
| **Cleanliness:**<br>Overall Cleanliness, Pest/Vermin Infestation | X | | | |
| **Electrical** | X | | | |
| **Restrooms/Fountains:**<br>Restrooms, Sinks/ Fountains | X | | | |
| **Safety:**<br>Fire Safety, Hazardous Materials | X | | | |
| **Structural:**<br>Structural Damage, Roofs | X | | | |
| **External:**<br>Playground/School Grounds, Windows/ Doors/Gates/Fences | X | | | |

## Overall Facility Rate

| Exemplary | Good | Fair | Poor |
|---|---|---|---|
| | X | | |

## B. Pupil Outcomes

### State Priority: Pupil Achievement

The SARC provides the following information relevant to the State priority: Pupil Achievement (Priority 4):

**Statewide Assessments**
(i.e., California Assessment of Student Performance and Progress [CAASPP] System includes the Smarter Balanced Summative Assessments for students in the general education population and the California Alternate Assessments [CAAs] for English language arts/literacy [ELA] and mathematics given in grades three through eight and grade eleven. Only eligible students may participate in the administration of the CAAs. CAAs items are aligned with alternate achievement standards, which are linked with the Common Core State Standards [CCSS] for students with the most significant cognitive disabilities).

The CAASPP System encompasses the following assessments and student participation requirements:

1. **Smarter Balanced Summative Assessments and CAAs for ELA** in grades three through eight and grade eleven.
2. **Smarter Balanced Summative Assessments and CAAs for mathematics** in grades three through eight and grade eleven.
3. **California Science Test (CAST) and CAAs for Science** in grades five, eight, and once in high school (i.e., grade ten, eleven, or twelve).

**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.

## 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.

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 2021-22 | School 2022-23 | District 2021-22 | District 2022-23 | State 2021-22 | State 2022-23 |
|---|---|---|---|---|---|---|
| **English Language Arts/Literacy** (grades 3-8 and 11) | 30 | 34 | 55 | 55 | 47 | 46 |
| **Mathematics** (grades 3-8 and 11) | 9 | 33 | 39 | 40 | 33 | 34 |

## 2022-23 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** | 60 | 56 | 93.33 | 6.67 | 33.93 |
| **Female** | 22 | 20 | 90.91 | 9.09 | 30.00 |
| **Male** | 38 | 36 | 94.74 | 5.26 | 36.11 |
| **American Indian or Alaska Native** | -- | -- | -- | -- | -- |
| **Asian** | -- | -- | -- | -- | -- |
| **Black or African American** | -- | -- | -- | -- | -- |
| **Filipino** | 0 | 0 | 0 | 0 | 0 |
| **Hispanic or Latino** | -- | -- | -- | -- | -- |
| **Native Hawaiian or Pacific Islander** | 0 | 0 | 0 | 0 | 0 |
| **Two or More Races** | 11 | 10 | 90.91 | 9.09 | -- |
| **White** | 35 | 33 | 94.29 | 5.71 | 39.39 |
| **English Learners** | -- | -- | -- | -- | -- |
| **Foster Youth** | -- | -- | -- | -- | -- |
| **Homeless** | -- | -- | -- | -- | -- |
| **Military** | 0 | 0 | 0 | 0 | 0 |
| **Socioeconomically Disadvantaged** | 35 | 33 | 94.29 | 5.71 | 24.24 |
| **Students Receiving Migrant Education Services** | 0 | 0 | 0 | 0 | 0 |
| **Students with Disabilities** | 16 | 16 | 100.00 | 0.00 | 6.25 |

## 2022-23 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** | 60 | 57 | 95.00 | 5.00 | 33.33 |
| **Female** | 22 | 20 | 90.91 | 9.09 | 35.00 |
| **Male** | 38 | 37 | 97.37 | 2.63 | 32.43 |
| **American Indian or Alaska Native** | -- | -- | -- | -- | -- |
| **Asian** | -- | -- | -- | -- | -- |
| **Black or African American** | -- | -- | -- | -- | -- |
| **Filipino** | 0 | 0 | 0 | 0 | 0 |
| **Hispanic or Latino** | -- | -- | -- | -- | -- |
| **Native Hawaiian or Pacific Islander** | 0 | 0 | 0 | 0 | 0 |
| **Two or More Races** | 11 | 11 | 100.00 | 0.00 | 36.36 |
| **White** | 35 | 33 | 94.29 | 5.71 | 42.42 |
| **English Learners** | -- | -- | -- | -- | -- |
| **Foster Youth** | -- | -- | -- | -- | -- |
| **Homeless** | -- | -- | -- | -- | -- |
| **Military** | 0 | 0 | 0 | 0 | 0 |
| **Socioeconomically Disadvantaged** | 35 | 34 | 97.14 | 2.86 | 23.53 |
| **Students Receiving Migrant Education Services** | 0 | 0 | 0 | 0 | 0 |
| **Students with Disabilities** | 16 | 16 | 100.00 | 0.00 | 31.25 |

## 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.

Science test results include the CAST 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 CAST 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.

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.

| Subject | School 2021-22 | School 2022-23 | District 2021-22 | District 2022-23 | State 2021-22 | State 2022-23 |
|---|---|---|---|---|---|---|
| **Science** (grades 5, 8 and high school) | 0.00 | 41.67 | 36.99 | 38.80 | 29.47 | 30.29 |

## 2022-23 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** | 13 | 12 | 92.31 | 7.69 | 41.67 |
| **Female** | -- | -- | -- | -- | -- |
| **Male** | -- | -- | -- | -- | -- |
| **American Indian or Alaska Native** | -- | -- | -- | -- | -- |
| **Asian** | -- | -- | -- | -- | -- |
| **Black or African American** | -- | -- | -- | -- | -- |
| **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** | 0 | 0 | 0 | 0 | 0 |
| **Foster Youth** | -- | -- | -- | -- | -- |
| **Homeless** | -- | -- | -- | -- | -- |
| **Military** | 0 | 0 | 0 | 0 | 0 |
| **Socioeconomically Disadvantaged** | -- | -- | -- | -- | -- |
| **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.

### 2022-23 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. The administration of the PFT during 2021-22 and 2022-23 school years, 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 |
|---|---|---|---|---|---|

## 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.

### 2023-24 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.

## 2022-23 Chronic Absenteeism by Student Group

| Student Group | Cumulative Enrollment | Chronic Absenteeism Eligible Enrollment | Chronic Absenteeism Count | Chronic Absenteeism Rate |
|---|---|---|---|---|
| **All Students** | 119 | 110 | 26 | 23.6 |
| **Female** | 48 | 45 | 8 | 17.8 |
| **Male** | 71 | 65 | 18 | 27.7 |
| **Non-Binary** | 0 | 0 | 0 | 0.0 |
| **American Indian or Alaska Native** | 2 | 2 | 0 | 0.0 |
| **Asian** | 3 | 3 | 0 | 0.0 |
| **Black or African American** | 7 | 5 | 0 | 0.0 |
| **Filipino** | 0 | 0 | 0 | 0.0 |
| **Hispanic or Latino** | 20 | 16 | 7 | 43.8 |
| **Native Hawaiian or Pacific Islander** | 0 | 0 | 0 | 0.0 |
| **Two or More Races** | 23 | 23 | 9 | 39.1 |
| **White** | 64 | 61 | 10 | 16.4 |
| **English Learners** | 5 | 5 | 1 | 20.0 |
| **Foster Youth** | 6 | 4 | 1 | 25.0 |
| **Homeless** | 12 | 12 | 4 | 33.3 |
| **Socioeconomically Disadvantaged** | 68 | 62 | 19 | 30.6 |
| **Students Receiving Migrant Education Services** | 0 | 0 | 0 | 0.0 |
| **Students with Disabilities** | 27 | 25 | 9 | 36.0 |

# 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.

| Rate | School 2020-21 | School 2021-22 | School 2022-23 | District 2020-21 | District 2021-22 | District 2022-23 | State 2020-21 | State 2021-22 | State 2022-23 |
|---|---|---|---|---|---|---|---|---|---|
| **Suspensions** | 1.45 | 3.01 | 3.36 | 0.67 | 4.01 | 3.85 | 0.20 | 3.17 | 3.60 |
| **Expulsions** | 0.72 | 0.00 | 0.00 | 0.01 | 0.31 | 0.38 | 0.00 | 0.07 | 0.08 |

## 2022-23 Suspensions and Expulsions by Student Group

| Student Group | Suspensions Rate | Expulsions Rate |
|---|---|---|
| **All Students** | 3.36 | 0 |
| **Female** | 2.08 | 0 |
| **Male** | 4.23 | 0 |
| **Non-Binary** | | |
| **American Indian or Alaska Native** | 0 | 0 |
| **Asian** | 0 | 0 |
| **Black or African American** | 0 | 0 |
| **Filipino** | 0 | 0 |
| **Hispanic or Latino** | 0 | 0 |
| **Native Hawaiian or Pacific Islander** | 0 | 0 |
| **Two or More Races** | 13.04 | 0 |
| **White** | 1.56 | 0 |
| **English Learners** | 0 | 0 |
| **Foster Youth** | 0 | 0 |
| **Homeless** | 0 | 0 |
| **Socioeconomically Disadvantaged** | 1.47 | 0 |
| **Students Receiving Migrant Education Services** | 0 | 0 |
| **Students with Disabilities** | 11.11 | 0 |

## 2023-24 School Safety Plan

The School Safety Plan has been written by the Director with input from the Safety Committee and the school's insurance provider. The Safety Plan is updated annually by March 1st and 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, 2023. 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 16, 2023. 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.

# 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.

## 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 | | |

## 2022-23 Elementary Average Class Size and Class Size Distribution

This table displays the 2022-23 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 |
|---|---|---|---|---|

## 2022-23 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 |

## 2022-23 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** | |
| **Social Worker** | |
| **Nurse** | 0.1 |
| **Speech/Language/Hearing Specialist** | 0.4 |
| **Resource Specialist (non-teaching)** | |
| **Other** | |

## Fiscal Year 2021-22 Expenditures Per Pupil and School Site Teacher Salaries

This table displays the 2021-22 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 | $75,201 |
| **Percent Difference - School Site and District** | N/A | N/A | -5.0 | -55.8 |
| **State** | N/A | N/A | $7,607 | $90,632 |
| **Percent Difference - School Site and State** | N/A | N/A | 11.2 | -70.9 |

## Fiscal Year 2022-23 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 or a counseling intern under the supervision of the MSW, 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.

## Fiscal Year 2021-22 Teacher and Administrative Salaries

This table displays the 2021-22 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** | $50,108 | $55,550 |
| **Mid-Range Teacher Salary** | $67,799 | $84,645 |
| **Highest Teacher Salary** | $106,711 | $111,284 |
| **Average Principal Salary (Elementary)** | $118,745 | $139,860 |
| **Average Principal Salary (Middle)** | $129,245 | $146,440 |
| **Average Principal Salary (High)** | $130,183 | $158,447 |
| **Superintendent Salary** | $244,827 | $278,268 |
| **Percent of Budget for Teacher Salaries** | 32.14% | 32.21% |
| **Percent of Budget for Administrative Salaries** | 4.12% | 4.89% |

## 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 2023-2024 the Director attended an intensive training in leading transformative change through inclusion and equity and has led activities for the staff and faculty throughout the year.

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, the Science of Reading, 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 sixth 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 for the past two years. 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 | 2021-22 | 2022-23 | 2023-24 |
|---|---|---|---|
| **Number of school days dedicated to Staff Development and Continuous Improvement** | 6 | 4 | 4 |

SHERWOOD MONTESSORI

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

Date/Time: **Thursday, February 22, 2024 – 6:00 p.m.**
Location: 1071 E. 16th Street Room 1, Chico, CA 95928

**AGENDA**

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

**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, Tina Hanson-Lewis, Samantha Lawson, Kati Boomgarden, Emma Cluff

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

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, January 18, 2024.

**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.*

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

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

**E.3.1 Safety Plan** The Board will be asked to approve the updated Comprehensive School Safety Plan.
**Action Requested:** Approve Safety Plan.

**E.3.2 Mid-year LCAP Report** The Board will receive a mid-year LCAP report pursuant to requirements of SB 114 Sec. 42 (Charters): EC 47606.5 (e).
**Action Requested:** Receive report.

**E.3.3 Advertising Plan** The Board will be asked to discuss advertising plan.
**Action Requested:** Discuss advertising plan.

**E.3.4 Formal Complaint Procedures** The Board will discuss the School's formal complaint policies and procedures.
**Action Requested:** Discuss Complaint Policies and Procedures

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

The Board may discuss any aspect of the upcoming retreat and set a date.

**F. FUTURE AGENDA ITEMS** (7:20)

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

**G. PUBLIC EMPLOYEE DISCIPLINE/DISMISSAL/RELEASE**

(f) With respect to every item of business to be discussed in closed session pursuant to Section 54957.613

**H. ADJOURNMENT** (7:25)

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. Called to order at 6:08 by Tina. Sam, Emma, and Tina present
B. Consent Agenda (6:14)
    a. Consent agenda motioned by Sam, seconded by Emma, unanimously accepted (6:15)
C. No Public comment (6:15)
D. No notice of public hearing (6:16)
E. Regular Business (6:20)
    a. E.2.1. Instructional Staff Report - No comment from the board
    b. E.2.2. School Director Report
        i. Updated enrollment: 114 students
    c. E.2.3. Treasurer's Report
        i. Report briefly discussed
    d. Action Items
        i. E.3.1 Purchase Policy Revision (6:41)
            1. Motioned by Emma, Seconded by Sam, unanimously approved by the board
        ii. E.3.2. Travel Policy Revision (6:50)
            1. Motioned by Tina, Seconded by Emma, unanimously approved by the board
        iii. E.3.3 School Accountability Report Card (7:01)
            1. Motioned by Emma, seconded by Sam, unanimously approved by the board
    e. Board Governance
        i. Motioning for a closed meeting - Motioned by Sam, Seconded by Tina, unanimously approved. (7:10)
            1. Plan to meet in the library on Feb 1st, 2024 at 6:00pm
        ii. Changing the date of the February Board Meeting (7:16)
            1. Meeting moved to Feb 22nd instead of Feb 15th
            2. Motioned by Emma, Seconded by Tina, voted upon unanimously.
    f. Future agenda items briefly discussed
        i. Adding future discussing of planning a board retreat on the 1st of February
    g. Adjournment (7:21)

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** February 22, 2024

---

**Administrative**

- Updated enrollment will be reported at the meeting.
- We are currently fully staffed but are seeking more substitute teachers to add to our list as we have lost subs to full-time employment opportunities at other schools.
- Charter leaders continue to meet with CUSD representatives to explore the possibility of putting a facilities bond on the November ballot.
- The classified staff had a Grief-Sensitive Schools training and we were gifted children's books on the topic of grief. We will soon receive a $500 grant to use on efforts towards supporting kids and families through grief.
- The teachers had a professional development on Gifted Education in Montessori Classrooms.

**Legislative**

- I have been researching several new laws and their impact on school operations, including: AB 889, AB 659, AB 1651 and AB 671. At a recent Charter Leaders meeting we discussed how we could get more support from charter and educational agencies to get this information efficiently.

**Community & Promotion**

- I had the first Coffee with the Director morning in February and met with one parent to discuss parent involvement and her experiences thus far at Sherwood.
- Our mosaic medallion that was created with grant funds from the North Valley Community Foundation and matched funds from the Rainforest Art Project was installed on the morning of February 14th. We had a lovely reveal ceremony and the finished mosaic was beautiful! The Rainforest Art Project people will be back to mount the finished piece to the side of the blue building at 1010 that can be seen from Cleveland Ave.


SHERWOOD MONTESSORI
CHARTER SCHOOL

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

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

**Date:** February 22, 2024, 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 2024 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 686,597 as of January 31,2024 for the checking account.
- The expenses in January were for the normal operating cost.

Profit & Loss

The January 2024 Profit & Loss report shows a Net Income of $ -222,365, which was offset by $ 48,818 LCF funds deposited in February 2024 along with $8,211 ELOP. The actual Net Income for January 2024 is $ -165,336. The school has received grant funds of $40,000 in February and a $21,000 refund of Comcast fiberoptic service cost through the e-Rate program.

- Cash Flow
  The school should end the year with a positive cash balance assuming the final ADA is greater than 95 and state revenues are not significantly reduced. P1 ADA is 104 which will be used to calculate and fund the current year.
  The Legislative Analyst's Office is projecting a deficit for 2022 and 2023 tax collections. This may result in a call back of funds received in 2022-23 and a reduction in 2023-24 apportionment. The Governor's initial budget for 2024-25 does not include a substantial reduction in allocations for either year but is subject to change at the May 2024 revise.

# Sherwood Montessori
## Profit & Loss YTD Comparison
July 2023 through January 2024

| | Jul '23 - Jan 24 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | 783,853 |
| **Total Income** | 783,853 |
| **Gross Profit** | 783,853 |
| **Expense** | |
| **1000 Certificated Salaries** | 324,900 |
| **2000 Classified Salaries** | 253,251 |
| **3000-Employee Benefits** | 191,814 |
| **4000-Books and Supplies** | 26,743 |
| **5000 Services/Other Op. Exp.** | 209,510 |
| **Total Expense** | 1,006,218 |
| **Net Ordinary Income** | -222,365 |
| **Net Income** | **-222,365** |

**Sherwood Montessori**
**Board of Directors - Vendor Payments Report**
**January 2024**

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 01/02/2024 | ACH | Macquarie Equipment Capit... | Kyocera Copier Lease JAN 2... | Copier Lease | 223.00 |
| Check | 01/04/2024 | ACH | CharterSAFE | BILLED PREMIUM - LIABILI... | 5400-Liability Insurance | 3,129.00 |
| Check | 01/04/2024 | ACH | CharterSAFE | BILLED PREMIUM - WC 20... | 3601-Workers Comp | 1,488.00 |
| Check | 01/04/2024 | 9786 | CUSD | FUA INV24-00062 2023 NO... | CUSD FUA Charges | 1,837.90 |
| Check | 01/06/2024 | DBT | Craigslist | JOB AD | Advertising | 20.00 |
| Check | 01/08/2024 | DBT | Learning A-Z | RAZ-PLUS READING A-Z LI... | Software Licensing | 132.00 |
| Check | 01/08/2024 | DBT | Directional Ad-Vantage Hol... | CHICO MALL KIOSK - 2023 ... | Advertising | 295.00 |
| Check | 01/08/2024 | DBT | Costco | SNACKS | Extended Day | 453.00 |
| Check | 01/08/2024 | DBT | Office Depot | SUPPLIES | Office Supplies | 195.66 |
| Check | 01/10/2024 | 9790 | E-rate Advisors | INV - FIRST HALF YEAR | Contracted Service | 750.00 |
| Check | 01/10/2024 | 9791 | Maia Illa, LCSW | Supervision-Swanson INV3 ... | Contracted Service | 480.00 |
| Check | 01/10/2024 | 9792 | PARK AVENUE PEST CO... | SERVICE 2023 DEC | Pest Control | 85.00 |
| Check | 01/10/2024 | 9787 | Chico Country Day | NURSE CONTRACT INV 25... | Contracted Service | 1,298.72 |
| Check | 01/10/2024 | 9788 | City of Chico | SERVICE - 2023 DEC | Sewer | 57.74 |
| Check | 01/10/2024 | 9789 | Barney James Kerr | HOURS 8 X 33.00 LCAP FA... | Contracted Service | 264.00 |
| Check | 01/10/2024 | 9789 | Barney James Kerr | MATERIALS | Maintenance Supplies | 86.55 |
| Check | 01/10/2024 | DBT | Target | CUSINART | Instructional Supplies | 108.24 |
| Check | 01/10/2024 | EFT | Comcast 4454 | SERVICE - DEC 2023 | Internet Service Provider | 471.31 |
| Check | 01/10/2024 | EFT | Waste Management | SERVICE - 2023 DEC | Trash/Recycling | 140.44 |
| Check | 01/10/2024 | EFT | California Water Service C... | SERVICE DEC 2023 | Water | 26.17 |
| Check | 01/11/2024 | DBT | Amazon.com | TOWELS-RAGS | Instructional Supplies | 35.67 |
| Check | 01/11/2024 | DBT | Amazon.com | PENS-PEN HOLDER | Office Supplies | 12.98 |
| Check | 01/12/2024 | 9793 | Adam Mankoski | SUPPLIES | Instructional Supplies | 19.44 |
| Check | 01/12/2024 | 9794 | North State Parent Magazine | DIRECTORY 275.00 + COO... | Advertising | 460.00 |
| Check | 01/12/2024 | EFT | PG & E | MONTHLY SERVICE 2023 ... | Electricity | 742.98 |
| Check | 01/12/2024 | DBT | Directional Ad-Vantage Hol... | CHICO MALL KIOSK - 2023 ... | Advertising | 295.00 |
| Check | 01/12/2024 | DBT | Amazon.com | SUPPLIES | Instructional Supplies | 108.85 |
| Check | 01/13/2024 | ACH | COSTCO VISA CARD | THRU 15TH PURCHASES 2... | SHERWOOD COSTCO VISA | 1,443.25 |
| Check | 01/16/2024 | DBT | Amazon.com | OUTDOOR UTILITY WAGON | PE | 93.02 |
| Check | 01/17/2024 | 7556 | Aripez, Vanessa . | JULY ACCOUNT PAYOUT - ... | Deferred Payroll | 545.88 |
| Check | 01/17/2024 | DBT | Wufoo | SERVICE - 2023 DEC-JAN 24 | Online List Management | 19.00 |
| Check | 01/17/2024 | DBT | Amazon.com | WATERPROOF CLOCK | Office Supplies | 18.39 |
| Check | 01/18/2024 | EFT | Comcast Business 9110 | SERVICE - 2023 DEC-JAN | Telephone, Landline | 188.04 |
| Check | 01/19/2024 | DBT | Costco | SNACKS | Extended Day | 473.93 |
| Check | 01/21/2024 | DBT | Amazon.com | ERASABLE PENS | Office Supplies | 19.37 |
| Check | 01/23/2024 | DBT | FoodMaxx | PRODUCE | Instructional Supplies | 10.74 |
| Check | 01/23/2024 | DBT | FoodMaxx | SUPPLIES | Office Supplies | 40.46 |
| Check | 01/23/2024 | DBT | Amazon.com | MONTHLY PRIME FEE - 20... | 5300-Dues and Membership | 16.23 |
| Check | 01/23/2024 | ACH | Verizon Wireless | SERVICE DEC-JAN 24 | Telephone, Cellular | 94.56 |
| Check | 01/23/2024 | DBT | Amazon.com | PENS | Office Supplies | 23.26 |
| Check | 01/25/2024 | EFT | Heather Fisher | PBIS MEETING FOOD | Food - Meetings | 60.83 |
| Check | 01/26/2024 | DBT | UPGRADED LIVING MAG... | AD IN UPGRADED LIVING ... | Advertising | 200.00 |
| Check | 01/29/2024 | DBT | USPS | mailings | Postage | 3.79 |
| Check | 01/29/2024 | DBT | FoodMaxx | GROCERIES | Food (Instructional) | 22.83 |
| Check | 01/29/2024 | DBT | Amazon.com | HOSE WATER TIMER | Maintenance Supplies | 46.50 |
| Check | 01/29/2024 | DBT | Amazon.com | NOISE CANCELLING HEAD... | Instructional Supplies | 86.59 |
| Check | 01/30/2024 | DBT | Facebook Ads | JOB AD - $2 X 3 | Advertising | 6.00 |
| Check | 01/30/2024 | DBT | Amazon.com | SUPPLIES- ADAM | Instructional Supplies | 65.97 |
| Check | 01/31/2024 | 9797 | PARK AVENUE PEST CO... | SERVICE 2024 JAN | Pest Control | 85.00 |
| Check | 01/31/2024 | EFT | Comcast 4454 | SERVICE - 2024 JAN | Internet Service Provider | 471.67 |
| Check | 01/31/2024 | DBT | Amazon.com | SUPPLIES | Instructional Supplies | 14.60 |
| **TOTAL** | | | | | | **17,266.56** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Comprehensive School Safety Plan**

**Date:** February 22, 2024

---

**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 components. Presentation at this public meeting serves to provide an opportunity for stakeholders to give input.

**ACTION REQUESTED**

Adopt plan.

Attachment: 2024-2025 Comprehensive School Safety Plan

# Comprehensive School Safety Plan

## 2024-2025
## School Year

**School:** Sherwood Montessori
**CDS Code:** 04614240121475
**District:** Sherwood Montessori
**Address:** 1010 Cleveland Ave.
Chico
**Date of Adoption:**
**Date of Update:** February 2024
**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-Lewis | Vice Chair, Board of Directors | | |
| Sami Lawson | Treasurer, Board of Directors | | |
| Emma Cluff | Secretary, Board of Directors | | |
| Kati Boomgarden | 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: Sherwood takes preventative action and actively participates in the California Safe Schools Assessment. Data is collected, reported, and reviewed on all crimes committed on the school campus. Sherwood recognizes that a safe school continually assesses its progress by identifying problems, collecting information regarding progress toward solutions, and by sharing this information with students, families, and the community at large. Keeping reportable crimes to a minimum requires constant vigilance. During the school day, staff members, teachers and the administrator provide campus supervision, specifically identified potential problem areas like the public park and parking lot and the play structures/playground to reduce discipline, crime, or other school safety concerns.

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
M. Procedures to Address Possible Opioid Overdose

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 "DUCK, COVER, HOLD." Students will move away from any glass, 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. Do not reenter buildings or allow students to do so until it is deemed safe to enter. c. Wait for signal to determine if and when to move students.
   d. Evacuate to designated areas on the playground. Take roll.
   e. If necessary, render first aid.

**Tornado**

1. Warning Signal

2. Procedures
   a. If in the classroom, the teacher or person in authority will call "take cover." Students will get under a desk or table if no interior space (such as a bathroom or closet) is available. They should be as far away from windows and exterior walls as possible.
   b. If students are on the playground, they should take cover immediately indoors.
   c. Wait for signal to determine if and when to move students.
   d. Evacuate to designated areas on the playground.

**Detailed Earthquake Procedures**

1. For earthquakes, the quake itself is the signal to drop and take cover. (Duck-Cover-Hold) Tell students not to try to run during a quake. Broken legs can occur if people run. Students should drop to the ground if they are on the playground. If in the room, they should try to cover themselves in case windows break. Try to drop under a table or desk if possible. Stay down until the shaking subsides.

2. If we are able to announce an all clear signal, teachers are responsible to decide when to take students outside to the assembly area (on playground where we line up for fire drills). Use your best judgment.

3. In a severe quake, students may be injured. Remember that the first step of triage is to instruct all the students to stand up and walk out with you. Those who can't move are your most serious injuries. You may have to leave a student in the room in order to make sure the rest of your group is safe. The sweep and rescue team will take care of the student left behind. This example would not occur except in the most severe kind of earthquake.

4. Always have an up-to-date list of your students in an accessible location. Teachers will need these to make sure all students are accounted for. Teachers will be responsible to take the list when exiting the classroom.

*Office Staff*

Office Staff will act as coordinators for communication and for the Release Center. At the first sign of an earthquake, all students and staff will drop in the "duck and cover" position until the shaking stops. An all-clear signal will be made verbally by Director through intercom or in person or by messenger. Evacuate at own discretion as necessary.

1. Status check/assess damages in own room - flashlight/batteries.
2. Office Staff set up release area near front of office, depending on damage to building. a. A table and two chairs are needed.

b. Need cell phone available and walkie talkie.
c. Emergency forms
d. Medical lists and medications
e. Emergency office supply box
f. Sign out form/release slips
g. Middle School runners to take release slips to class areas.

3. Director will establish the Release Center near the front of building (by the Sherwood sign) a.
Cell phone and clipboard

b. Tables and chairs
c. Send first aid release forms to first aid station (once you are outside and are able to assess injuries).

5. All support personnel report to the Director at the Release Center after their students are released.
6. The designated staff member will coordinate the Sweep Teams. Check utilities and will only shut off utilities if there are gas or water leaks. Assess damages.

a. Gas, water heaters, kitchen, check utilities
b. Electrical
c. Water

7. First aid team sets up first aid station located by the swings.
8. Sweep Team takes injured to first aid area.
9. Extra staff take positions at front and back gates to direct parents or emergency vehicles.
10. Releasing Students

a. A designated adult is either recognized or shows identification to the office staff.
b. The office staff records release of student on form. Designated adult signs.
c. A release slip for each child will be given to a runner who will go to the appropriate class area to get the child. Parents will only go on the playground for injured students. d. The teacher keeps the release slips.

*Sweep Team*

Purpose: account for all students and staff, check physical condition of school for unsafe areas.

1. Meet at the Release Center. Sweep team members (3)–assign a runner and two room checkers.
2. Check every room and all bathrooms, multi-purpose room, library, 1010 Cleveland, Learning Center, and the office.
3. Try to open doors, use a crow bar covered with a jacket, etc. to open/break a window if necessary.
4. If all rooms are cleared, check gas lines.

*First Aid Team*

Location will be near or in the office. Those staff members trained in CPR/First aid will assist those in need. After students are in their areas and accounted for, the team goes to First Aid area.

*Teachers and Students*

Major responsibility of teachers is for their own students. Teachers are to remain with their students and follow evacuation procedures.

1. At the first sign of an earthquake, all students and staff will drop in the "duck and cover" position until the shaking stops. If we cannot ring an “all clear” bell, classrooms will be notified and the message will be shared via the walkie talkies. If signal is not sounded, classes may evacuate to evacuation area (playground, church side) at teacher discretion.
2. Status check/assess damages in own room - flashlight/batteries.
3. Follow planned escape route or determine safer route and proceed to evacuation area on the playground.
4. Take current class list and first aid kit.
5. Leave immobile students in the classroom with a desk placed over them if possible. Assure child that help is on the way.
6. All rooms will be checked for injuries or fatalities.
7. When in the evacuation area, always take status check on current roll sheet.
8. Students will remain in the designated open areas until their parents come for them, or until instructions are received from authorities in charge.
9. Release child only when release slip is presented. Keep release slips for records. Condition of the child at the time of release will be noted.

*Special Teachers*

Resource, Speech, Spanish, Drama, Music, A.P.E., Cooking/Gardening, etc. are responsible for any students with them at the time of the emergency. Once in the evacuation area, they release students to their respective teachers. Report to Release Center or sweep team.

COMMUNICATIONS PLAN

1. Telephone/cell phone use will be limited to the Release Center contacting parents/guardians until normalcy is restored to keep communication clear and the focus on stabilizing the situation.
2. Office personnel will use either a battery-operated two-way walkie talkies to communicate with teachers and other school staff.
3. Teachers are responsible for reporting to the Director.
4. Office personnel will notify Fire, Police, and Paramedics if necessary.
5. When calm is restored, and injuries and damages are stabilized, staff members may try to phone family members.

**Fire**

1. Warning Signal: Series of short bells continue until building is evacuated to the playground.
2. Procedures:
   a. If the smell of smoke or gas is detected, teacher will walk class immediately to designated evacuation area. Be sure doors are closed and lights are turned off.
   b. If there is no smell of smoke or gas, lock the classroom and stay inside as in a lockdown procedure/code red until the announcement "this is an evacuation" followed by the code phrase. 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.

**Explosion**

1. Staff and students should drop and cover.
2. Evaluate the situation and decide on necessary actions (e.g., evacuation).
3. Inform the office of the situation as quickly and calmly as possible.

4. Render first aid if necessary.
5. Wait for instructions from Site Administrator via Walkie Talkies, channel 5.

**Lockdown /Barricade Procedure**

The lockdown code is:

All Call (Walkie Talkies, channel 5): "Teachers please secure your students in your classrooms immediately. It is necessary to begin a lockdown."

- 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). Sherwood office will communicate to the classroom teachers and staff via walkie talkies channel 5.

*Variations to the lockdown procedure:*

1. Classes in progress (not during recess/lunch/PE):

Teacher Response to a Lockdown:

- Bring any students outside the classroom in and lock the classroom door(s) immediately. Your classroom door should already be locked with the lock block on. Lock your door and, close curtains, shut off lights, 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. Use Walkie Talkies, channel 5, 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.
- 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 walkie talkies in your room. Students will be instructed to enter the nearest classroom if the need to lockdown is urgent and they are not near their classroom. Students who are out after doors are closed should go to the office.
- 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
   - 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. A member of the office staff should quickly lock all doors.
   - 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. You will need to tell the 911 operator to ask the law enforcement EMS to use your name, from Sherwood, who called in to 911 about _____. The law enforcement EMS will repeat this information at the locked door, which you should then open to access help.
Example of 911 call:
*This is Michelle from Sherwood. We are located on Chapman Elementary campus and are on lockdown, but I have a student who is having a seizure. I need you to send the police EMS to room 9 and tell her or him to say: "I am here for Michelle from Sherwood who called about a student having a seizure."*

Example of Law Enforcement EMS at the door:
*This is Officer Richards from Chico PD EMS. I am here for Michelle from Sherwood who called about a student having a seizure. Staff would then open the door to allow the EMS to enter and administer medical assistance.*

**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 date of 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 on the east side of campus. Any child on campus before 8:30 a.m. must check in to Extended Day. Extended Day is an optional program and students must be registered prior to attending.

Children arriving after 8:45 a.m. are tardy and must be signed in at the front office, Room 3.

Dismissal/ Pick Up Procedures

- 2:50 is the regular pick-up time for all students in grades TK-3 every day. 2:55 is the regular pick-up time for students in grades 4-8.
- For students in grades TK-3, we ask that parents pick kids up at the classrooms.
- Students in grades 4-8 are dismissed to walk home, ride bikes home, or walk if parents have signed a permission form. Students in grades 4-8 may walk out to their rides or wait for a pick up at the picnic tables near the garden.
- At 2:55, all students in all grades who have not been picked up will be checked in to Extended Day and supervised by after school care staff.
- Students who do not have an Extended Day contract and are on campus before or after school will be sent to the office and a call home will be made.

These procedures ensure that all students are under the supervision of an adult, either a parent or child care staff, at all times while on Sherwood's campus.

**(H) A Safe and Orderly School Environment Conducive to Learning (EC 35294.2)**

Under the California Constitution, Section I (c) (c) Right to Safe Schools: All students and staff of public primary, elementary, junior high and senior high schools have the inalienable right to attend campuses which are safe, secure and peaceful. This policy is to provide procedures ensuring a safe, secure, and peaceful school for our community.

While Sherwood Montessori encourages parents/guardians and interested members of the community to visit Sherwood Montessori and view the educational program, Sherwood Montessori also endeavors to create a safe environment for students and staff. As such, parents and other visitors must adhere to the following policy in order to maximize the safety of the students and minimize the disruption to the education environment.

Parents/guardians and other visitors, including children who are not students at Sherwood Montessori, shall not loiter on Sherwood Montessori premises, including the parking lot and outside school buildings. The parking lot shall be used for picking up and dropping off students, and while conducting business. Parents/guardians and other visitors are expected to leave the campus premises upon the conclusion of any business matters or after dropping their student off at school. If a parent or guardian wishes to visit Sherwood Montessori to view the educational program, the visitor must follow the following procedures, which have been developed to ensure

the safety of students and staff as well as to minimize interruption of the instructional program, pursuant to California Penal Code Sections 627, et, seq.:

1. Visits during school hours should first be arranged with the teacher and Director or designee, at least three days in advance, and after the first six to eight weeks of school. If a conference is desired, an appointment should be set with the teacher during non-instructional time, at least three days in advance. Parents seeking to visit a classroom during school hours must first obtain the written approval of the classroom teacher and the Director or designee.

2. All visitors shall register with the front office immediately upon entering any school building or grounds when during regular school hours. When registering, the visitor is required to provide his/her name, address, occupation, age (if under 21), his/her purpose for entering school grounds, and proof of identity. For purposes of school safety and security, the Director or designee may design a visible means or identification for visitors while on school premises.

3. The Director, or designee, may refuse to register an outsider if he or she has a reasonable basis for concluding that the visitor's presence or acts would disrupt the school, its students, its teachers, or its other employees; would result in damage to property; or would result in the distribution or use of unlawful or controlled substances.

4. The Director or designee may withdraw consent to be on campus even if the visitor has a right to be on campus whenever there is reasonable basis for concluding that the visitor presence on school grounds would interfere or is interfering with the peaceful conduct of the activities of the school, or would disrupt or is disrupting the school, its students, its teachers, or its other employees.

5. The Director or designee may request that a visitor who has failed to register, or whose registration privileges have been denied or revoked, promptly leave school grounds. When a visitor is directed to leave, the Director or designee shall inform the visitor that if he/she reenters the school without following the posted requirements he/she will be guilty of a misdemeanor.

6. Any visitor that is denied registration or has his/her registration revoked may request a hearing before the Director or the Board on the propriety of the denial or revocation. The request shall be in writing, shall state why the denial or revocation was improper, shall give the address to which notice of hearing is to be sent, and shall be delivered to either the Director or the Board President within five days after the denial or revocation. The Director or Board President shall promptly mail a written notice of the date, time, and place of the hearing to the person who requested the hearing. A hearing before the Director shall be held within seven days after the Director receives the request. A hearing before the Board shall be held at the next regularly scheduled Board meeting after the President receives the request.

7. The Director or designee shall seek the assistance of the police in dealing with or reporting any visitor in violation of this policy.

8. At each entrance to Sherwood Montessori grounds of, signs shall be posted specifying the hours during which registration is required, stating where the office of the Director or designee is located and what route to take to that office, and setting forth the penalties for violation of this policy.

9. No electronic listening or recording device may be used by students or visitors in a classroom without the teacher's and Director's written permission.

Penalties

1. Pursuant to the California Penal Code, if a visitor does not leave after being asked or if the visitor returns without following the posted requirements after being directed to leave, he/she will be guilty of a crime as specified which is punishable by a fine of up to $500.00 or imprisonment in County jail for a period of up to six (6) months or both.

2. Further conduct of this nature by the visitor may lead to the School's pursuit of a restraining order against such visitor which would prohibit him/her from coming onto school grounds or attending School activities for any purpose for a period of three (3)years.

**(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**

Lockdown /Barricade Procedure

1. All Call (Walkie Talkies, channel 5): "Teachers please secure your students in your classrooms immediately. It is necessary to begin a lockdown."
2. 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.
3. 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). Sherwood office will communicate to the classroom teachers and staff via walkie talkies channel 5.

Variations to the lockdown procedure:

1. Classes in progress (not during recess/lunch/PE):

Teacher Response to a Lockdown:

1. Bring any students outside the classroom in and lock the classroom door(s) immediately. Your classroom door should already be locked with the lock block on. Lock your door and, close curtains, shut off lights, 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.

2. 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.
3. Portable classrooms should form a circular shield of desks/tables/furniture to stop bullets should they pierce the walls.
4. 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.
5. Advise students that there is some type of emergency that requires a lockdown, but that you don't know what it is.
6. 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.
7. Turn your own cell phone ringer off. Use Walkie Talkies, channel 5, 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.).
8. 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.
9. Wait until the office asks for your classroom's accounting of students to report missing students.
10. Ignore any fire alarm activation–the school will never be evacuated using this method during a lockdown.
11. Project a calm attitude to quell student fears.
12. Remain in the room until advised in person by office staff or Director that it is safe to end lockdown procedures.
13. When or if students are moved from the classroom, assist them in moving as quietly and quickly as possible.
14. 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.
15. Do not open your door unless you recognize the voice telling you to open the door. We will communicate via the walkie talkies in your room. Students will be instructed to enter the nearest classroom if the need to lockdown is urgent and they are not near their classroom. Students who are out after doors are closed should go to the office.

17. 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.

18. Inform students that if they ever hear gunshots while they are outside, they are to lie down on the ground right where they are. The supervision duty person will announce when he or she wants the students to proceed to the nearest room. If students are on the way to the bathroom, or to the office, or are otherwise out of the classroom during class time, they must go into the nearest room when they hear the lockdown announcement or when they hear a gunshot.

To students outside at recess/lunch/PE:

1. 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."
2. 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

1. Principal, playground supervisors, or a designated staff member will contact office immediately with the announcement, "It is necessary to begin a lockdown".
2. Students should be instructed to drop to the playground and cover their heads.
3. Students should be instructed to get up and quickly line up when shooting stops.
4. The office staff should alert all teachers to lockdown. A member of the office staff should quickly lock all doors.
5. Via 9-1-1, local enforcement will be contacted immediately.
6. If possible, a staff member should keep the office informed of the location of the intruder.
7. Staff members should use caution when approaching a stranger/intruder on campus.

8 Never approach someone with a weapon of any kind.

When approaching an intruder/stranger, staff members should:

1. Be courteous and confident
2. Keep a distance from the individual
3. Not touch the individual
4. Protect him/herself at all times
5. Encourage students either verbally or with hand signals to keep away from the situation.
6. 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.

1. In the event that an intruder is able to force his/her way into a classroom, be prepared to fight back.
2. Arm students with books, staplers, or other heavy objects to throw at the intruder.
3. 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.

1. 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.
2. 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.
3. 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, who called in to 911 about _____. The law enforcement EMS will repeat this information at the locked door, which you should then open to access help.
Example of 911 call:
This is Michelle from Sherwood. We are located on Chapman Elementary campus and are on lockdown, but I have a student who is having a seizure. I need you to send the police EMS to room 9 and tell her or him to say: "I am here for Michelle from Sherwood who called about a student having a seizure."

Example of Law Enforcement EMS at the door:
This is Officer Richards from Chico PD EMS. I am here for Michelle from Sherwood who called about a student having a seizure. Staff would then open the door to allow the EMS to enter and administer medical assistance.

**(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.

**(M) Procedures to Address Possible Opioid Overdose**

**IF SOMEONE IS EXPERIENCING A MEDICAL EMERGENCY, CALL 911 IMMEDIATELY**
It is rare for someone to die immediately from an overdose – it is usually a process that takes anywhere from a few minutes to a few hours. When people survive, it’s because someone was there to respond.
If someone is overdosing, they will be 1) not breathing and 2) not responsive. Below are the immediate steps you want to take in the event of an opioid overdose.
If someone is not breathing (skin turning blue/gray, pinpoint pupils, deep gurgling sound) and not responsive, follow these steps.
STEP 1. CALL 911 IMMEDIATELY
STEP 2. Stimulate them awake by yelling their name and administering a hard sternum rub to the chest plate.
STEP 3. Call 911, explain someone is not responsive and not breathing and may be overdosing on an opioid.
STEP 4. Provide rescue breathing with a protective barrier

- Get the person on their back, tip their head back to straighten the airway, pinch their nose, put your mouth over theirs and form a seal, one breath every five seconds

STEP 5. When the person starts to breathe regularly on their own, roll them into a recovery position on their side

## 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

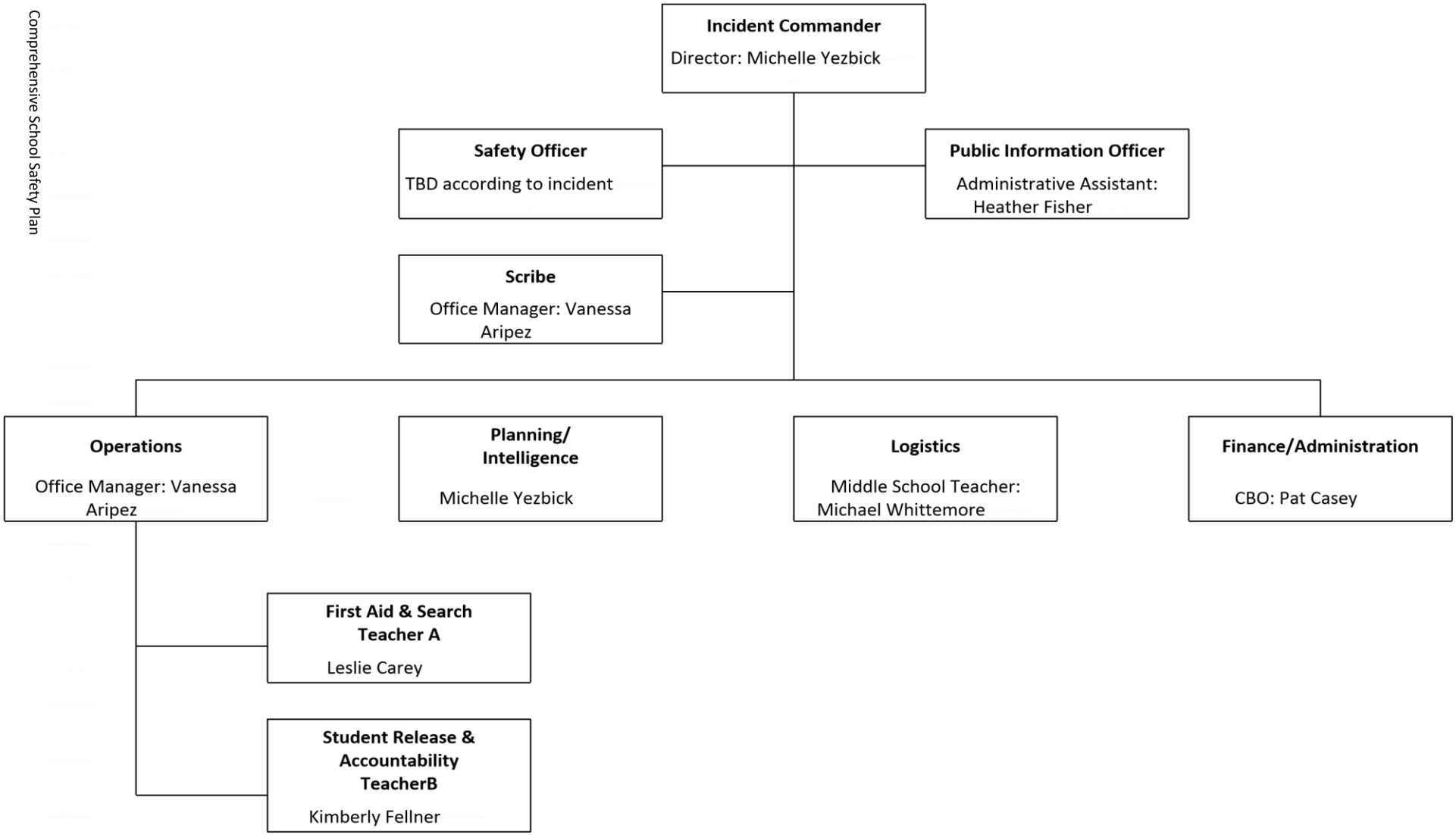
Emergency Contact Numbers

**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 | |
| Other | Butte County Department of Public Health | 530-552-4000 | |
| Public Utilities | Water | 530-893-6300 | |
| Public Utilities | Gas & Electric, PG&E | 877-660-6789 | |
| Local Hospitals | Enloe | 530-332-7330 | |
| 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 or more | Prior to annual update, teachers are consulted for needed revisions |
| PBIS Team Meetings | Monthly | Meeting notes are stored on school computers |
| Safety Committee Meetings | Annually or more | Notes from meeting are incorporated in updated CSSP. |
| Board Meeting | Annually or more | Agendas and minutes on website and in office |


Incident Commander
Director: Michelle Yezbick
Safety Officer
TBD according to incident
Public Information Officer
Administrative Assistant: Heather Fisher
Scribe
Office Manager: Vanessa Aripez
Operations
Office Manager: Vanessa Aripez
Planning/ Intelligence
Michelle Yezbick
Logistics
Middle School Teacher: Michael Whittemore
Finance/Administration
CBO: Pat Casey
First Aid & Search Teacher A
Leslie Carey
Student Release & Accountability TeacherB
Kimberly Fellner

**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**
Lockdown /Barricade Procedure
1. All Call (Walkie Talkies, channel 5): "Teachers please secure your students in your classrooms immediately. It is necessary to begin a lockdown."
2. 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.
3. 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). Sherwood office will communicate to the classroom teachers and staff via walkie talkies channel 5.

Variations to the lockdown procedure:
1. Classes in progress (not during recess/lunch/PE):
Teacher Response to a Lockdown:
1. Bring any students outside the classroom in and lock the classroom door(s) immediately. Your classroom door should already be locked with the lock block on. Lock your door and, close curtains, shut off lights, 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.

2. 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.
3. Portable classrooms should form a circular shield of desks/tables/furniture to stop bullets should they pierce the walls.
4. 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.
5. Advise students that there is some type of emergency that requires a lockdown, but that you don't know what it is.

6. 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.
7. Turn your own cell phone ringer off. Use Walkie Talkies, channel 5, 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.).
8. 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.
9. Wait until the office asks for your classroom's accounting of students to report missing students.
10. Ignore any fire alarm activation–the school will never be evacuated using this method during a lockdown.
11. Project a calm attitude to quell student fears.
12. Remain in the room until advised in person by office staff or Director that it is safe to end lockdown procedures.
13. When or if students are moved from the classroom, assist them in moving as quietly and quickly as possible.
14. 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.
15. Do not open your door unless you recognize the voice telling you to open the door. We will communicate via the walkie talkies in your room. Students will be instructed to enter the nearest classroom if the need to lockdown is urgent and they are not near their classroom. Students who are out after doors are closed should go to the office.
17. 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.
18. Inform students that if they ever hear gunshots while they are outside, they are to lie down on the ground right where they are. The supervision duty person will announce when he or she wants the students to proceed to the nearest room. If students are on the way to the bathroom, or to the office, or are otherwise out of the classroom during class time, they must go into the nearest room when they hear the lockdown announcement or when they hear a gunshot.

To students outside at recess/lunch/PE:

1. 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."
2. 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

1. Principal, playground supervisors, or a designated staff member will contact office immediately with the announcement, "It is necessary to begin a lockdown".
2. Students should be instructed to drop to the playground and cover their heads.
3. Students should be instructed to get up and quickly line up when shooting stops.
4. The office staff should alert all teachers to lockdown. A member of the office staff should quickly lock all doors.
5. Via 9-1-1, local enforcement will be contacted immediately.
6. If possible, a staff member should keep the office informed of the location of the intruder.
7. Staff members should use caution when approaching a stranger/intruder on campus.

8 Never approach someone with a weapon of any kind.

When approaching an intruder/stranger, staff members should:

1. Be courteous and confident
2. Keep a distance from the individual
3. Not touch the individual
4. Protect him/herself at all times
5. Encourage students either verbally or with hand signals to keep away from the situation.
6. 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.
1. In the event that an intruder is able to force his/her way into a classroom, be prepared to fight back.
2. Arm students with books, staplers, or other heavy objects to throw at the intruder.
3. 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.
1. 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.
2. 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.
3. 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, who called in to 911 about _____. The law enforcement EMS will repeat this information at the locked door, which you should then open to access help.
Example of 911 call:
This is Michelle from Sherwood. We are located on Chapman Elementary campus and are on lockdown, but I have a student who is having a seizure. I need you to send the police EMS to room 9 and tell her or him to say: “I am here for Michelle from Sherwood who called about a student having a seizure.”

Example of Law Enforcement EMS at the door:
This is Officer Richards from Chico PD EMS. I am here for Michelle from Sherwood who called about a student having a seizure. Staff would then open the door to allow the EMS to enter and administer medical assistance.

**Biological or Chemical Release**
If a biological or chemical release is determined to be a risk for the staff or students of Sherwood, all students and personnel will remain indoors with windows and doors shut tightly. Staff will follow roles outlined in the Incident Command System to coordinate with first responders. When it is safe to do so, staff will begin to release students to parents while remaining in Incident Command System roles to keep order and record when and with whom students are released.

**Bomb Threat/ Threat Of violence**
A bomb threat will result in a building evacuation with students and staff proceeding to the far end of the playground field, lining up in fire drill order near the fence. The Chico Police Department will be called at (530) 897-4900 and school staff will follow the instructions of the officer assigned to the incident.

A threat of violence will result in a lockdown procedure and call to the Chico Police Department. Students and staff will remain in lockdown until the incident is determined to be resolved by the Chico Police.

**Bus Disaster**
Sherwood does not have a bus.

**Disorderly Conduct**
Disorderly conduct observed by a stranger outside the school will be reported to the Chico Police Department if the conduct appears to be dangerous. If the individual appears to pose a threat to students or staff on the school site, lockdown procedures may be initiated.

**Earthquake**
Earthquake
1. Warning Signal

2. Procedures
a. If in the classroom, the teacher or person in authority will call "DROP." Students will get under a desk, table, or doorway and assume the duck and cover position and hold on to legs of table.
b. If students are on the playground, they should stay away from buildings and trees, drop, and assume the proper position.
c. Wait for signal to determine if and when to move students.
d. Evacuate to designated areas on the playground.

Detailed Earthquake Procedures
1. For earthquakes, the quake itself is the signal to drop and take cover. (Duck-Cover-Hold) Tell students not to try to run during a quake. Broken legs can occur if people run. Students should drop to the ground if they are on the playground. If in the room, they should try to cover themselves in case windows break. Try to drop under a table or desk if possible. Stay down until the shaking subsides.

2. If we are able to announce an all clear signal, teachers are responsible to decide when to take students outside to the assembly area. Use your best judgment.

3. In a severe quake, students may be injured. Remember that the first step of triage is to instruct all the students to stand up and walk out with you. Those who can't move are your most serious injuries. You may have to leave a student in the room in order to make sure the rest of your group is safe. The sweep and rescue team will take care of the student left behind. This example would not occur except in the most severe kind of earthquake.

4. Always have an up-to-date list of your students in an accessible location. Teachers will need these to make sure all students are accounted for. Teachers will be responsible to take the list when exiting the classroom.

Office Staff
Office Staff will act as coordinators for communication and for the Release Center. At the first sign of an earthquake, all students and staff will drop in the "duck and cover" position until the shaking stops. An all-clear signal will be made verbally by Director through intercom or in person or by messenger. Evacuate at own discretion as necessary.

1. Status check/assess damages in own room - flashlight/batteries.
2. Office Staff set up release area near front of office, depending on damage to building. a. A table and two chairs are needed.
b. Need phone available - cellular phone or walkie talkie.
c. Emergency forms
d. Medical lists and medications
e. Emergency office supply box
f. Sign out form/release slips
g. Middle School runners to take release slips to class areas.
3. Director will establish the Release Center near the front of building
a. Cell phone and clipboard
b. Tables and chairs

c. Send first aid release forms to first aid station (once you are outside and are able to assess injuries).
5. All support personnel report to the Director at the Release Center after their students are released.
6. The designated staff member will coordinate the Sweep Teams. Check utilities and will only shut off utilities if there are gas or water leaks. Assess damages.
a. Gas, water heaters, kitchen, check utilities
b. Electrical
c. Water
7. First aid team sets up first aid station located by the swings.
8. Sweep Team takes injured to first aid area.
9. Extra staff take positions at front and back gates to direct parents or emergency vehicles.
10. Releasing Students
a. A designated adult is either recognized or shows identification to the office staff.
b. The office staff records release of student on form. Designated adult signs.
c. A release slip for each child will be given to a runner who will go to the appropriate class area and get the child. Parents will only go on the playground for injured students. d. The teacher keeps the release slips.

Sweep Team

Purpose: account for all students and staff, check physical condition of school for unsafe areas.

1. Meet at the Release Center. Sweep team members (4)–assign a runner, an entrance "monitor," and two room checkers.
2. Check every room and all bathrooms, multi-purpose room, library, 1010 Cleveland, Learning Center, and the office.
3. Try to open doors, use a crow bar covered with a jacket, etc. to open/break a window if necessary.
4. If all rooms are cleared, check gas lines.

First Aid Team

Location will be near or in the office. Those staff members trained in CPR/First aid will assist those in need. After students are in their areas and accounted for, the team goes to First Aid area.

Teachers and Students

Major responsibility of teachers is for their own students. Teachers are to remain with their students and follow evacuation procedures.

1. At the first sign of an earthquake, all students and staff will drop in the "duck and cover" position until the shaking stops. If we cannot ring an "all clear" bell, classrooms will be notified and the message will be spread room to room via the buddy system. If that is not possible, classes will evacuate to evacuation area (playground, church side) at teacher discretion.
2. Status check/assess damages in own room - flashlight/batteries.
3. Follow planned escape route or determine safer route and proceed to evacuation area on the playground.
4. Take current class list and first aid kit.
5. Leave immobile students in the classroom with a desk placed over them if possible. Assure child that help is on the way.
6. All rooms will be checked for injuries or fatalities.
7. When in the evacuation area, always take status check on current roll sheet.
8. Students will remain in the designated open areas until their parents come for them, or until instructions are received from authorities in charge.
9. Release child only when release slip is presented. Keep release slips for records. Condition of the child at the time of release will be noted.

Special Teachers

Resource, Speech, Spanish, Drama, Music, A.P.E., Cooking/Gardening, etc. are responsible for any students with them at the time of the emergency. Once in the evacuation area, they release students to their respective teachers. Report to Release Center or sweep team.

COMMUNICATIONS PLAN

1. Telephone/cell phone use will be limited to the Release Center until normalcy is restored.
2. Office personnel will use either a battery-operated radio or car radio for outside use.
3. Teachers are responsible for reporting to the Director.
4. Office personnel will notify Fire, Police, and Paramedics if necessary.

5. When calm is restored, and injuries and damages are stabilized, staff members may try to phone family members.

**Explosion or Risk Of Explosion**

Explosion or risk of explosion on campus will result in a building evacuation with students and staff proceeding to the far end of the playground field, lining up in fire drill order near the fence. The Chico Police Department will be called at (530) 897-4900 and school staff will follow the instructions of the officer assigned to the incident.

**Fire in Surrounding Area**

If a fire in the surrounding area is determined to be causing poor air quality but there is no risk of the fire spreading to the school, students and staff will remain indoors with doors and windows shut tightly.

If it is determined that the fire could spread to the school, an evacuation will be conducted with coordination from emergency personnel. The school does not have a bus, so vehicular evacuation will require coordination with first responders. Sherwood's Incident Command System will be implemented to track dismissal of students and recording when and with whom students were released.

**Fire on School Grounds**

Fire

1. Warning Signal: Series of short bells continue until building is evacuated to the playground.
2. Procedures:

a. If the smell of smoke or gas is detected, teacher will walk class immediately to designated evacuation area. Be sure doors are closed and lights are turned off.

b. If there is no smell of smoke or gas, lock the classroom and stay inside as in a lockdown procedure/code red until the all clear signal is given. Have walkie talkies on channel 5 and turned up, wait to respond to 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.

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.

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Prevention Strategies

CLEANING. A virus generally lives 2 to 8 hours on surfaces, but certain viruses may live up to a week or longer. Friction is a key element in cleaning by using soap (or detergent) and water to physically remove germs, dirt, and impurities from surfaces or objects. Cleaning does not necessarily kill germs, but lowers their numbers and mitigates the necessary host environment for pathogen survival, concurrently reducing the risk of spreading infection.

DISINFECTING. Disinfection is the destruction of pathogenic or other harmful microorganisms by use of chemicals on surfaces or objects. Disinfecting does not necessarily clean dirty surfaces or remove germs. Disinfecting agents specifically target infectious pathogens and can lower the risk of spreading infection by killing germs on a surface after it has been cleaned. Disinfection is generally intended for patient-care items in health care facilities. Disinfection requires contact between the disinfectant and the surface to be disinfected for at least ten minutes under moist conditions.

SANITIZING. Sanitizing reduces the number of microbial contaminants on surfaces or objects to a relatively safe level, as judged by public health standards or requirements. Sanitizing works by either cleaning or disinfecting surfaces or objects to lower the risk of spreading infection.

a. Routine Cleaning and Disinfecting. It is important to match cleaning and disinfecting activities to the types of microorganisms to be removed.

Flu viruses are relatively fragile and can live and potentially infect a person for only 2 to 8 hours after being deposited on a surface, so standard cleaning and disinfecting practices are sufficient to remove or kill them. It is not necessary to close schools to clean or disinfect every surface in the building to slow the spread of flu.

Special cleaning and disinfecting processes, including wiping down walls and ceilings, frequently using room air deodorizers, and fumigating, are not necessary or recommended. These processes can irritate eyes, noses, throats, and skin; aggravate asthma; and

cause other serious side effects. If surfaces or objects are soiled with body fluids or blood, use gloves and other standard precautions to avoid coming into contact with the fluid. Remove the spill, and then clean and disinfect the surface.

Extra attention should be paid in cleaning the following areas:

- Classrooms with young children. Clean and sanitize toys regularly.
- Common areas. Clean and periodically sanitize desks, tables, countertops and drinking fountains.
- High touch areas. Computer keyboards, doorknobs and handles, visual aids, and telephones.

Do not mix cleaners and disinfectants unless the labels indicate it is safe to do so. Combining certain products (such as chlorine bleach and ammonia cleaners) can result in serious injury or death.

b. Handle waste properly. Follow standard procedures for handling waste, which may include wearing gloves. Place no-touch waste baskets where they are easy to use. Throw disposable items used to clean surfaces and items in the trash immediately after use. Avoid touching used tissues and other waste when emptying waste baskets. Wash your hands with soap and water after emptying waste baskets and touching used tissues and similar waste.

Universal Precautions

Universal precautions are a set of guidelines that assume that all blood and certain other bodily fluids are potentially infectious. Follow universal precautions when providing care to any individual, whether or not the person is known to be infectious.

The list below describes universal precautions:

a. Handwashing

Handwashing is one of the best tools for controlling the spread of infections. All students and staff should perform effective hand washing, which will reduce the amount of illness in schools. Avoid eating or touching mouth or eyes while giving any first aid.

Wash hands thoroughly with warm running water and a mild liquid soap for at least 15 seconds. Scrub between fingers, under fingernails and around the tops and palms of hands:

- Before and after physical contact with any person (even if gloves have been worn)
- After contact with a cleaning agent
- After using the restroom
- After providing first aid
- Before and after eating or handling food
-

b. Personal Protective Equipment (PPE)

- Wear disposable gloves when in contact with blood or any body fluid
- Wear protective eyewear whenever eyes may come in contact with body fluids (e.g.: squirting blood)
- Wipe up any blood or body spills as soon as possible
- Double-bag the gloves/soiled paper towels in plastic bags and dispose of immediately
- Clean the area with an approved disinfectant or bleach solution (bleach: water= 1:10)
- Send all soiled clothing home with the person in a double-bagged plastic bag

Immunizations

Childhood Immunizations

Immunizations help prevent serious illnesses. State health regulations require students attending school to be up-to-date on all immunizations. A waiver signed by a licensed physician is required for a valid medical exemption. Hepatitis A, influenza, and bacterial meningitis vaccines are available but not required for school attendance. Seasonal flu vaccination is strongly recommended for anyone over 6 months of age. California law requires students entering grades 7 through 12 to provide proof of Tdap immunization to enter school. Schools should have documentation of the immunization status of all students on file.

Adult Immunizations

The California Department of Public Health strongly recommends that school personnel be vaccinated against diphtheria, tetanus, mumps, measles, polio, chickenpox (varicella), and rubella (German measles). It is especially important for women of childbearing age to be immune to rubella, as this infection can cause complications for the developing fetus. Seasonal flu vaccination is strongly recommended.

Animals/Pets at School

Animals in the classroom can be beneficial in the education process. However, some animals can transmit infectious diseases to humans. For example, reptiles shed Salmonella bacteria in their feces without being sick themselves. People can contaminate their hands with feces when they handle or clean up after the animal, and disease can spread through the fecal?oral route explained above. Some animals are not appropriate for the classroom, such as: poisonous animals (e.g., poisonous spiders, snakes, and insects); wild, stray, or aggressive animals; or animals from an unknown source. To minimize the risk of students and staff acquiring an infectious disease from animals, take simple precautions:

- Keep animal cages or enclosures clean and in good repair. Students who assist in cleaning the cage(s) should be supervised and should wash their hands afterwards.
- Students and staff should always wash their hands after any contact with animals, and after visiting places with animals such as zoos or farms.
- Students should never “kiss” animals or have them in contact with their faces.

PREPAREDNESS

Effective preparedness includes establishing policies to maintain sanitation, keep records current, conduct periodic inspections and regular maintenance and training for staff.

General Activities

- Plan, exercise, evaluate and revise the Emergency Plan for Infectious Disease;
- Train and equip staff to assure competencies and capacities needed to respond to an infectious disease outbreak;
- Develop strategic partnerships with local community health care institutions and providers, and local, State and federal response agencies and their staff;
- Develop and implement surveillance and reporting procedures to monitor illness patterns in the schools;
- Educate schools and parents about infectious disease and recommend protective measures

- Inform and update schools about the potential impacts of an infectious disease outbreak on essential services and city, county, and school infrastructure;
- Stockpile necessary equipment and supplies that will be needed to respond to a disease outbreak;
- Establish ventilation (HVAC) standards to be used during response and recovery (such as filter change schedules, etc.).

Personal Protective Equipment (PPE)

- Provide PPE to staff (For example, N-95, which must be fit-tested, or surgical masks and nitrile gloves, an alternative to latex gloves).
- Address PPE issues with staff (i.e. uncomfortable, frequent changes, difficulties recognizing coworkers, communication issues, one size does not fit all).
- Ensure that you have adequate stock and an array of sizes and types available.
- Provide and use alcohol-based hand sanitizer and non-aerosol spray disinfectant for commonly touched surfaces.
- Train all staff to use PPE, including administrators, maintenance and security staff.
- Encourage staff to talk about the PPE issues and to develop a "we will get through this" mentality.

Training

- Require new staff, including substitutes and volunteers, to complete First Aid and CPR training, including child CPR;
- Provide refresher awareness training for all staff;
- Train staff to use chemicals properly to prevent accidental contamination and human exposure;
- 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

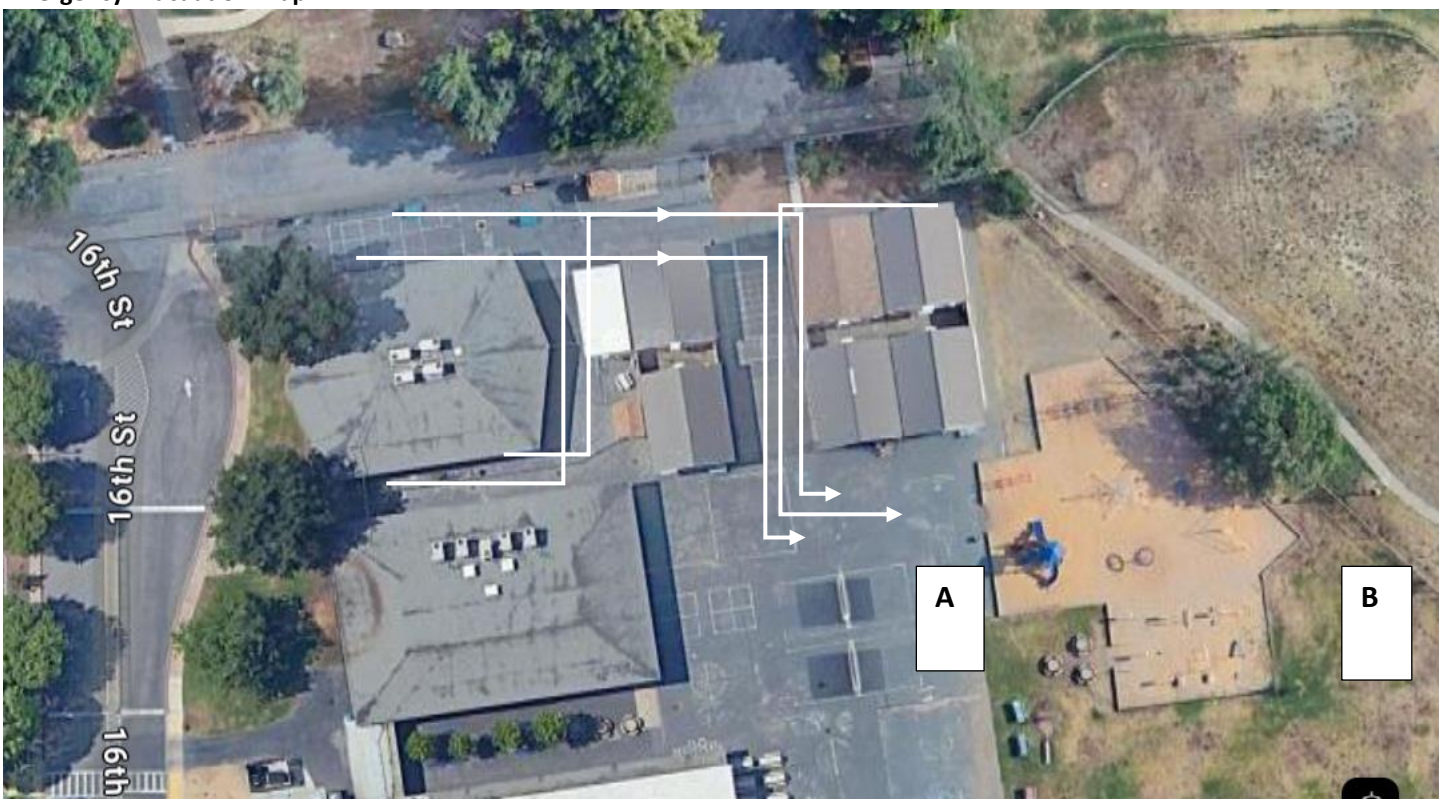
- Implement sanitization and disinfection procedures
- Deploy solid waste disposal plans
- Review processes and incident communication protocols
- Review impact on the school and community
- Evaluate lessons learned
- Review and revise procedures, as needed
- Retrain staff

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**







A-Students line up here for drills
B-Students line up here in actual emergency

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Mid-Year LCAP Update**

**Date:** February 22, 2024

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**SUMMARY**

Senate Bill 114 (2023) added a requirement for LEAs to present a report on the annual update to the Local Control and Accountability Plan (LCAP) and Budget Overview for Parents (BOP) on or before February 28 each at a regularly scheduled meeting of the governing board or body of the LEA.

**DISCUSSION**

This required report includes components required by law:

- All available midyear outcome data related to metrics identified in the current LCAP; and,
- All available midyear expenditure and implementation data on all actions identified in the current LCAP.

**ACTION REQUESTED**

Receive report.

Attachment: LCAP Mid-Year Monitoring Report for the 2023-24 LCAP

# Monitoring Goals, Actions, and Resources for the 2023-24 Local Control and Accountability Plan (LCAP)

This template is intended for internal monitoring purposes only. The 2023-24 LCAP template and instructions should be consulted when completing required documents.

(6) (A) The superintendent of the school district shall present a report on the annual update to the local control and accountability plan and the local control funding formula budget overview for parents on or before February 28 of each year at a regularly scheduled meeting of the governing board of the school district. (B) The report shall include both of the following: (i) All available midyear outcome data related to metrics identified in the current year's local control and accountability plan. (ii) All available midyear expenditure and implementation data on all actions identified in the current year's local control and accountability plan.

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

## Goal 1

| Goal Description |
|---|
| **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.**

## Expected Annual Measurable Objectives

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Mid-Year Outcome Data | 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 | 100% highly qualified credentialed teachers |
| CAASPP Scores | 33.4 Points Below Standard for ELA<br>90 Points Below Standard for math | 61.8 Points Below Standard for ELA<br>100.2 Points Below Standard for math | Increased 25.1 points to 58.3 Points Below Standard for ELA.<br>Increased 50.6 points to 74.5 Points Below Standard for math. | Star Renaissance ELA & Math assessment data indicate students overall on target for expected growth. | 20 Points Below Standard for ELA<br>60 Points Below Standard for math |
| Montessori Materials Inventories | Materials are in good repair, some classrooms need replacement materials | Materials are in good repair and teachers have ordered replacement materials for those showing wear. | New Montessori materials ordered for the second TK/K classroom, but few arrived. Materials showing wear or missing parts were replaced. | One fewer lower elementary classroom this year, so materials from this class were distributed to others. Missing materials ordered for the TK/K classroom. | 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. | Repairs request system implemented and facility is being kept up. PE and recess equipment check-out system working and new materials are ordered as old wear out. | 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. | Anecdotal data reported in IEP meetings indicate that students are making goals and enjoy learning in the Learning Center. Many students receiving intervention in first semester have been exited due to academic growth. | 80% Satisfied or Very Satisfied with Support Given to Struggling Learners |

**Actions & Measuring and Reporting Results**

| Goal # Action # | Action Title and Description | Contributing | Implementation Level | Mid-year Outcome Data | Other Data/Evidence (qualitative, quantitative, artifacts) | Total Funds Budgeted | Mid-Year Expenditures |
|---|---|---|---|---|---|---|---|
| 1.1 | **Provide highly qualified teachers for all students.** Highly qualified teachers will hold the appropriate credentials for their assignments. | No | Fully Implemented | 100% highly qualified teachers with appropriate credentials for their assignments. | | $1,575.00 | $1,000 |
| 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. | No | Fully Implemented | Students are showing academic growth as measured by Star Renaissance assessments. | 15 students who were below grade level at the beginning of the year are now at grade level in ELA or math or both, according to Star Renaissance assessments. | $33,382.00 | $17,250 |
| 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. | No | Fully Implemented | Classrooms are well-stocked with Montessori materials. | | $3,009.00 | $3,134 |
| 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. | No | Fully Implemented | Facility repairs are completed in a timely fashion. Recess equipment is being replenished as items become worn out. | | $19,588.00 | $14,800 |

| Goal # Action # | Action Title and Description | Contributing | Implementation Level | Mid-year Outcome Data | Other Data/Evidence (qualitative, quantitative, artifacts) | Total Funds Budgeted | Mid-Year Expenditures |
|---|---|---|---|---|---|---|---|
| | | | | | | | |
| 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. | No | Partially Implemented | SSTs are being conducted for most students who are below grade level in one or more academic area or who have behavioral needs. MTSS structure needs more work to reach the goal of using SST for all students who would benefit. | | $11,119.00 | $9,626 |

## Goal 2

| Goal Description |
|---|
| **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.** |

## Expected Annual Measurable Objectives

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Mid-Year Outcome Data | Desired Outcome for 2023-24 |
|---|---|---|---|---|---|
| Local metric/Parent Square | 100% parents contactable | 100% parents contactable | 100% parents contactable | 97% contactible-2 new students not yet in Parent Square database | 100% parents contactable |
| Local metric/Community Survey Results | 78% Satisfied or Very Satisfied with Opportunities the School has Extended to Learn about the Montessori Approach to Education | 91% of respondents satisfied or very satisfied with satisfaction in terms of: curriculum, in terms of Montessori authenticity.<br><br>91% of respondents satisfied or very satisfied with satisfaction in terms of: opportunity by the school to make an impact in academic outcomes for my student/s. | 90% of respondents satisfied or very satisfied with satisfaction in terms of: curriculum, in terms of Montessori authenticity.<br><br>81% of respondents satisfied or very satisfied with satisfaction in terms of: opportunity by the school to make an impact in academic outcomes for my student/s. | TBD | 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. |
| 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. | 22% of families have reported volunteer hours; 4% have met or exceeded 15 hours at this point of the 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 | 23.6% Chronic Absenteeism Rate | 11.62% | 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. | 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 | 3.4% | mid-year rate of 3.87% | 2.8% suspension rate or lower |

**Actions & Measuring and Reporting Results**

| Goal # Action # | Action Title and Description | Contributing | Implementation Level | Mid-year Outcome Data | Other Data/Evidence (qualitative, quantitative, artifacts) | Total Funds Budgeted | Mid-Year Expenditures |
|---|---|---|---|---|---|---|---|
| **2.1** | **Ensure that parents understand the ways the school communicates with students' families.**<br>All parents will be enrolled in Parent Square with current contact information and preferences | No | Fully Implemented | All parents are contactable, aside from two new families. Databases take a few days to update, and the new families will be able to get Parent Square | | $6,000.00 | $4,375 |

| Goal # Action # | Action Title and Description | Contributing | Implementation Level | Mid-year Outcome Data | Other Data/Evidence (qualitative, quantitative, artifacts) | Total Funds Budgeted | Mid-Year Expenditures |
|---|---|---|---|---|---|---|---|
| | indicated for email, text or both as well as a current phone number with which to receive robocalls from the school. | | | communications. These families are reachable by phone or email. | | | |
| 2.2 | **Ensure that parents understand the nature of the Montessori method of education.** Parents will have opportunities to learn about Montessori education. | No | Partially Implemented | Back to School Night and Open House were well-attended and almost all new families attend a school tour and observe briefly in the classrooms. We would like to see more parents observe in their children's classrooms. | | $31,259.00 | $18,144 |
| 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. | No | Fully Implemented | 22% of families have reported volunteer hours; 4% have met or exceeded 15 hours at this point of the year. | | $5,038.00 | $2,500 |
| 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. | No | Fully Implemented | 11.62% | | $15,384.00 | $4,450 |

## Goal 3

| Goal Description |
|---|
| **Socioeconomically disadvantaged students will have access to free or reduced lunch, free after school tutoring, and free child care before and after school.** |

## Expected Annual Measurable Objectives

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Mid-Year Outcome Data | Desired Outcome for 2023-24 |
|---|---|---|---|---|---|
| CAASPP scores | ELA 63 points below standard<br>Math 124.3 points below standard | ELA 82.6 points below standard<br>Math 107.4 points below standard | ELA increased 25.1 points to 58.3 points below standard<br>Math increased 50.6 points to 74.5 points below standard | Star Renaissance ELA & Math assessment data indicate students overall on target for expected growth. | ELA 40 points below standard<br>Math 90 points below standard |

**Actions & Measuring and Reporting Results**

| Goal # Action # | Action Title and Description | Contributing | Implementation Level | Mid-year Outcome Data | Other Data/Evidence (qualitative, quantitative, artifacts) | Total Funds Budgeted | Mid-Year Expenditures |
|---|---|---|---|---|---|---|---|
| **3.1** | **Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks.**<br>Students will have access to free breakfast and lunch through Chico Unified Nutrition Services and Sherwood will provide healthy snacks. | Yes | Fully Implemented | ELA increased 25.1 points to 58.3 points below standard<br>Math increased 50.6 points to 74.5 points below standard | 15 students who were below grade level at the beginning of the year are now at grade level in ELA or math or both, according to Star Renaissance assessments. | $8,713.00 | $4,156 |
| **3.2** | **Socioeconomically disadvantaged students will have access to free after school tutoring.** | Yes | Fully Implemented | ELA increased 25.1 points to 58.3 points below standard<br>Math increased 50.6 points to 74.5 points below standard | 15 students who were below grade level at the beginning of the year are now at grade | $69,050.00 | $62,530 |

| Goal # Action # | Action Title and Description | Contributing | Implementation Level | Mid-year Outcome Data | Other Data/Evidence (qualitative, quantitative, artifacts) | Total Funds Budgeted | Mid-Year Expenditures |
|---|---|---|---|---|---|---|---|
| | Students will have access to free tutoring after school as described in our Extended Learning Plan. | | | | level in ELA or math or both, according to Star Renaissance assessments. | | |
| 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. | Yes | Fully Implemented | ELA increased 25.1 points to 58.3 points below standard Math increased 50.6 points to 74.5 points below standard | 15 students who were below grade level at the beginning of the year are now at grade level in ELA or math or both, according to Star Renaissance assessments. | $69,050.00 | $14,052 |

## Goal 4

| Goal Description |
|---|
| **Socioeconomically disadvantaged students will have access to scholarships to attend field trips.** |

## Expected Annual Measurable Objectives

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Mid-Year Outcome Data | 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. | TBD | 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 & Measuring and Reporting Results**

| Goal # Action # | Action Title and Description | Contributing | Implementation Level | Mid-year Outcome Data | Other Data/Evidence (qualitative, quantitative, artifacts) | Total Funds Budgeted | Mid-Year Expenditures |
|---|---|---|---|---|---|---|---|
| 4.1 | **Socioeconomically disadvantaged students will have access to scholarships to attend field trips.**<br>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. | Yes | Partially Implemented | Students have been enjoying field trips so far this year and school covered cost for those who could not pay. | | $4,552.00 | $2,340 |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Advertising Plan**

**Date:** February 22, 2024

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**SUMMARY**

The Board is asked to contribute ideas to promote the school.

**DISCUSSION**

Sherwood Montessori is not a known entity for many families in the area, and others mistake it for a private school that requires tuition. The school does not employ any individuals with a marketing background. A discussion at the Board level may identify missed opportunities.

**ACTION REQUESTED**

Discuss advertising plan.

Attachments: Advertising Action Plan, renewal contract for advertisement at the Chico mall

# Sherwood Promotion Action Plan

| Action | Who? | By when? |
| --- | --- | --- |
| • 1. Engagement with social media- reply to posts & answer questions | • 1. Heather | • 1. As posts are made and within 24 hours |
| • 2. Update website with new photos | • 2. Vanessa (has yearbook photos), Heather & Michelle (have website access | • 2. In June |
| • 3. Testimonials | • 3. Parents and past student w/ Michelle using announcements and writing the email, Vanessa using Schoolwise contact information to send email, Teachers to request in person/Parent Square | • 3. Teacher Appreciation Week in May, Conferences in April |
| • 4. Tabling at Events: Barne's & Noble's, Farmers' Market, Endangered Earth Event, Thursday Night Market, Festivals, Chico Montessori Walk-a-Thon, soccer Saturdays | • 4. Parents (Michelle to write announcements & create sign up) | • 4. As events occur, sign ups in announcements 2 weeks prior; promote opportunity in Town Hall meetings and in Family Handbook as well as announcements |
| • 5. Flyers to Parents to Post | • 5. Michelle to write in announcements, office will have flyers | • 5. April |
| • 6. Sherwoodstock | • 6. Office has requests binder | • 6. Follow timeline in requests binder |

# Sherwood Promotion Action Plan

| Action | Who? | By when? |
| --- | --- | --- |
| • 7. Meet the teachers/ TK/K Open House evening event | • 7. Adam & Teresa | • 7. By April 21 |
| • 8. Promoting Parent Businesses | • 8. Michelle via School Announcements, teachers via Parent Square/conversations/conferences | • 8. In May |
| • 9. You Tube commercial | • 9. Michael with the middle school students | • 9. By April 30 |
| • 10. Sherwood song recording (for commercials) | • 10. Anne & Michael | • 10. By April 30 |
| • 11. Sherwood SWAG | • 11. Michelle & Heather | • 11. Order by April 14 |
| • 12. Parent magazine ads | • 12. Michelle & Heather | • 12. Pulbications reach out with their deadlines |
| • 13. Billboard? $795/month +$100 | • 13. Lamar of NorCal | • 13. By March |
| • 14. Postcard mailers? $2K | • 14. Creative Compositio | • 14. By March 7 |
| • 15. Chico Mall ad $300/month | • 15. Heather, Laura & Michelle | • 15. Done! |

# Advertising Contract

| Advertiser | |
|---|---|
| **Sherwood Montessori** | |
| Contact | **Michelle Yezbick** |
| Phone / Fax | **(530) 345-6600 / --- --- ----** |
| E-Mail | **michelle@sherwoodmontessori.org** |

| Contract Information 2401-41781 | |
|---|---|
| Program | |
| Contract Type | **Local** |
| Sales Person | **Don Woolery** |
| Approved on | |

| Agency | |
|---|---|
| **Sherwood Montessori** | |
| Contact | **Michelle Yezbick** |
| Phone / Fax | **(530) 345-6600 / --- --- ----** |
| E-Mail | **michelle@sherwoodmontessori.org** |
| 1010 Cleveland Avenue | |
| Chico,CA 95928 | |

| Production | |
|---|---|
| **Sherwood Montessori** | |
| Contact | **Michelle Yezbick** |
| Phone / Fax | **(530) 345-6600 / --- --- ----** |
| E-Mail | **michelle@sherwoodmontessori.org** |
| 1010 Cleveland Avenue | |
| Chico,CA 95928 | |

**Special Instruction**

Renewal
Client will receive 1 free artwork change for paid panels only.
Any artwork changes for free panels will be invoiced at $295
All terms remain unchanged

| Description | Panel | Start Date | End Date | Program | Rate | Line Total |
|---|---|---|---|---|---|---|
| Chico Mall (Chico,CA) (47" x 69") | Lvl1-5A | 3/4/24 | 3/2/25 | 52 Weeks | $295.00 | $3,835.00 |

**Please make checks payable to: Directional Ad-Vantage Holdings, LLC**

Billing Terms: First and Last month plus production charges due at signing. Last month billing applied to production and posting expense.

I have read and agreed to the Terms & Conditions on the back of this contract.

| | |
|---|---|
| **Total** | $3,835.00 |
| **Deposit (Production & Posting)** | $0.00 |
| **Commission** | $0.00 |
| **Balance Due** | $3,835.00 |

Date: _____
Accepted for: **Sherwood Montessori**
Agency: **Sherwood Montessori**
Auth Signature: _____
Michelle Yezbick

Date: _____
Accepted for: **Directional Ad-Vantage Holdings, LLC**
Auth Signature: _____

# STANDARD TERMS & CONDITIONS

**I.** Advertiser / Agency shall supply camera-ready artwork or all materials to be used in creating advertisement in accordance with ad requirement specifications for Smartlite Ads on or before Artwork Due Date, but in no event later than 15 days prior to Posting Date. Advertiser / Agency acknowledge sole responsibility for complete compliance with Smartlite ad requirement specs and deadline submittal of camera-ready artwork. In the event of any time delay and / or any non-compliance, Advertiser / Agency agrees to make the first payment for the panel cost commencing and based upon contracted Posting date. Time is of the essence for all provisions of this Contract. Smartlite agrees that all designs for the display will be faithfully reproduced. Smartlite reserves the right to reject any copy, pictoral or otherwise, which it deems unacceptable, for any reason.

**II.** Advertiser/Agency hereby represents that it owns all rights (including, all intellectual property rights, statutory or common law) in its marks, images, descriptions, representations and/or content submitted to Smartlite in connection with its creation of the Advertisement. Advertiser/Agency further warrants and represents that the materials provided by Advertiser/Agency for publication hereunder, do not violate any law, including, but not limited to any statute prohibiting false or deceptive advertising, and that the advertising itself is not libelous, deceptive, and does not infringe the intellectual property rights of third parties. For value received, the receipt and sufficiency of which is hereby acknowledged, Smartlite is hereby granted a nonexclusive, royalty free, perpetual, worldwide license to display Advertiser/Agency's mark(s), images descriptions, representations and/or content, to use the materials in any and all media. All drawings, images, artwork and/or other content, prepared by Smartlite into a final work product approved hereunder shall be deemed the sole property owned by Smartlite (hereinafter the "Work") and Smartlite shall retain all common law, statutory and other reserved rights, including copyrights, in the Work. The Work shall not be used by the Advertiser/Agency without the prior written agreement of Smartlite. The parties further agree that Smartlite shall be the sole owner of all ad posters that are displayed. This provisions contained in this Paragraph III shall survive the termination of this Agreement.

**III.** Smartlite shall produce ads for clients based on its current print production rate card. Advertiser / Agency shall approve all artwork. Ad messages shall be presumed to have been inspected and approved by Advertiser / Agency.

**IV.** At no additional cost to the Advertiser / Agency, Smartlite may install a brochure box for use by the Advertiser / Agency; provided, however, that Advertiser / Agency shall not use any artwork in any brochure box that has not been pre-approved by Smartlite in writing and that the use of the brochure box has been approved by the Shopping Center(s). Any subsequent changes made to any approved artwork shall be re-submitted by Advertiser / Agency to Smartlite for approval in writing of the modification prior to the distribution of any such modified artwork using Smartlite's brochure box. Notwithstanding the foregoing, Smartlite shall have the right, at any time during the term of this Contract and for any reason whatsoever, to cease Advertiser's / Agency's use of any brochure box. In such an event, Smartlite shall not be liable for any cost, damage or any other loss(es) that result from or are otherwise caused, directly or indirectly, by the cessation of this complimentary service; nor, shall such an event serve as any basis for Contract termination or any modification to the terms and conditions contained in the Contract. Smartlite shall give the Advertiser / Agency seven (7) days written notice of its intent to cease this complimentary service, after which time, the Advertiser / Agency shall cease using the subject brochure box. All terms and conditions of this Contract shall, in all respects, remain in full force and effect, and all such terms and conditions shall remain the same.

**V.** For value received, the receipt and sufficiency of which are hereby acknowledged by the parties, Agency and Advertiser hereby agree to defend, indemnify, and hold Smartlite harmless against all liability, including, without limitation, claims, demands, obligations, costs, expenses, damages, penalties, fines and charges, together with reasonable attorney's fees and disbursements, arising out of a breach or alleged breach by Agency and/or Advertiser of this contract, or arising out of or resulting from the content of the advertising material, art or copy furnished to Smartlite by Agency or Advertiser, including but not limited to its display, production and/or the use of such content by Smartlite.

**VI.** Payment Terms: At Contract signing, the sum for the first and the last billing period and any applicable first time print production cost is due. Thereafter, billing shall continue on the basis of successive four-week billing periods (with the first day of each billing period being a "Billing Date") through the Contract Term. For each billing period, Smartlite will invoice the Payment Amount on each Billing Date with Terms Net 30 days. If Advertiser / Agency shall fail to pay, when the same is due and payable, any amount or charge to be paid to Smartlite by Advertiser / Agency as provided in this Contract, such unpaid amounts shall bear interest from the due date thereof to the date of payment at the rate of eighteen percent (18%) per annum. In addition, Advertiser / Agency shall promptly reimburse Smartlite for any and all of Smartlite's costs and expenses including, without limitation, court costs and attorneys' fees in connection with Smartlite's collection of Advertiser's / Agency's obligations, including interest thereon at the rate of eighteen percent (18%) per annum. In the event such rate is prohibited by law, unpaid amounts shall bear interest at the maximum rate permitted by law. Advertiser / Agency hereby agrees that Smartlite shall have the sole right to cancel this contract and remove the display ad at any time based upon a delinquency in any payment required hereunder. Further, if Advertiser / Agency shall fail to pay, when the same is due and payable, any amount or charge to be paid to Smartlite by Advertiser / Agency as provided in this Contract, after Smartlite has made a written demand for the same, then all payments due to Smartlite during the term of this Contract shall be accelerated, thus, becoming immediately due and payable by Advertiser/Agency to Smartlite without further demand or notice. To the extent not otherwise prohibited by law, Smartlite shall disclose to all appropriate credit reporting agencies information relating to payments required hereunder that are delinquent more than 90 days or such longer period, as determined by Smartlite.

**VII.** Smartlite shall have the right to cancel this Contract or remove or relocate one or more of Advertiser's reserved Panel(s) at any time, without any liability whatsoever, for reasons beyond Smartlite's control, including but not limited to any termination of a location lease, change in law, ordinance, rule or regulation, or any mandate received by Smartlite from mall management. In the event of any removal of the Advertiser's panel, Advertiser's obligation to pay Rent for that Panel shall abate. In the event Smartlite requests a relocation of Advertiser's advertisement, Smartlite shall use best efforts to offer a comparable location and Advertiser shall use reasonable business judgment in either accepting or rejecting the alternate location. Advertiser shall have five (5) days to accept such alternate location. If Advertiser does not accept the alternate location, Advertiser's obligation to pay Rent for that Advertisement shall abate.

**VIII.** Advertiser / Agency shall not assign, sell or otherwise transfer this Contract without the prior express written consent of Smartlite. This Contract shall inure to the benefit of and be binding upon the successors and assigns of Smartlite.

**IX.** This instrument constitutes the entire Contract between the parties and cannot be modified except in writing signed by both parties. In the event that any provision of this Contract (or portion thereof) is determined by a court of competent jurisdiction to be invalid or otherwise unenforceable, such provision (or part thereof) shall be enforced to the fullest extent possible consistent within the stated intention of the Parties, or if incapable of such enforcement, shall be deemed to be deleted from this Contract, while the remainder of this Contract shall continue in full force and remain in effect according to its stated terms and conditions.

**X.** In the event Smartlite commences any action for nonpayment of charges or breach by Advertiser / Agency of any of its obligations pursuant to this Agreement, Advertiser / Agency hereby waives and shall not interpose any defense of improper venue or lack of personal jurisdiction in any such proceeding or action. Advertiser / Agency agrees that any claim, cause of action or lawsuit shall be brought in the County Court of the 15th Judicial Circuit, in and for Palm Beach County, Florida and that Florida law shall govern any such dispute. Smartlite's right(s), whether granted herein or elsewhere, in the event of default by Advertiser / Agency shall be cumulative and the exercise of one or more rights by Smartlite shall not be to the exclusion of the exercise of other rights at the same or a later time.

*I have read and agreed to the Terms & Conditions of this Contract.*

Accepted By: _____ Date: _____

Advertiser/Agency

Print Name: _____

www.smartliteusa.com | 4800 North Federal Highway • Suite 200-A • Boca Raton, FL 33431
Phone: (561) 416-0220 | Fax: (561) 416-0260 | Toll Free: 1-877-768-5483

smartlite

# SHERWOOD MONTESSORI

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

Date/Time: **Thursday, March 28, 2024 – 6:00 p.m.**
Location: 1017 E. 16th St., Room 1, Chico, CA 95928

## AGENDA

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

**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, Tina Hanson-Lewis, Samantha Lawson, Kati Boomgarden, Emma Cluff

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

**B.1 Minutes Approval** Consider approval of minutes from Special Meeting, February 1, 2024, Regular Meeting, February 22, 2024, and Regular Meeting, March 13, 2024
**B.2 Middle School Field Trip** Consider approval of field trip to Shakespeare Festival in Ashland, Oregon
**B.3 Upper Elementary Field Trip** Consider approval of field trip to the Forebay Aquatic Center

**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)

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

**E.2 Reports and Communications**

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

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

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

**E.3.1 Formal Complaint Procedures** The Board will discuss the School's formal complaint policies and procedures.
**Action Requested:** Discuss Complaint Policies and Procedures

**E.3.2 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.3.3 Adoption of Second Interim Budget**
Consider adopting the Second Interim Budget.
**Action Requested:** Adopt budget.

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

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

**F. FUTURE AGENDA ITEMS** (7:20)

The Board will be asked to discuss the 2024-2025 Local Control Accountability Plan (LCAP) and adopt the LCAP at a subsequent meeting before June 30. The Board will receive an update on Board Elections.

**G. CLOSED SESSION** (6:55)

**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. Title: School Director.

**H. ADJOURNMENT** (7:25)

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

MINUTES
REGULAR MEETING NOTICE OF THE BOARD OF DIRECTORS
Date/Time: Thursday, February 22, 2024 – 6:00 p.m. 1017 16th St., Chico, CA Room 1A.

AGENDA
A. CALL TO ORDER (6:15)
A.1 Land Acknowledgement
A.2 Roll call. All present except Emma Cluff who was on a wild goose chase looking for last minute deals on retro tablecloths in Gridley.

B. CONSENT AGENDA
Motion to approve the consent agenda by Sami; Tina was rapid fire on the second and the rest of us followed suit and affirmed with aplomb.

C., D. No public comments.

E. REGULAR BUSINESS
E.2.1 Director's report.
The Board engaged in a Romanesque discussion about enrollment numbers with enough twists and turns to be worthy of an operetta based on Kafka.
E.2.2. Treasurer's report
Pat discussed state budgets and deficits with the typical theatrical overtones, overshadowing the performance following the Director's report. In a move that was not to be predicted by anyone in attendance, the theme transitioned into an incredibly lengthy discussion about needing a fence. If you weren't there, you wouldn't believe home much discussion five grown adults could have about fences. But there you go.

E.3 Action Items
E.3.1 Safety Plan.
Following the drama of the fence, we naturally segued into the safety plan. Michelle noted potential changes and the board had an interesting time comparing policy vs. procedures. Kati made the motion to approve, Sami on 2nd , and the approval was unanimous. Well, except for Emma who was heading home after falling short in her epic quest.
E.3.2 Mid-year LCAP Report
Yep, we had a discussion on the LCAP, mostly focused on unravelling the figures but it looks pretty darn good.
E.3.3 Advertising Plan
The board weighed in on the various options for advertising our school.

Russell couldn't stand it any longer and did the unconventional, but legal, procedure to ask for a break. Board was in recess from 8:05 to 8:15.

E.3.4 Formal Complaint Procedures

The board decided to move the discussion of formal complaints to March meeting. Meanwhile, Sami will gather a list of the relevant sections to review.

At 8:30 the board moved into a closed meeting with the director, Michelle.
At 8:33 the board moved out of the closed session. Needless to say, not much happened.
At 8:34 the board reconvened publicly in a Special Meeting to approve the extension of the E Rate Service Contract with BCOE. It seemed fine, and we didn't really have a second option so Tina made the motion to approve, Kati seconded, and the rest of us followed in step.

The Board Retreat has been approved for March 5 from 10-2. More details will be forthcoming.

After what seemed like a marathon of Gilgamesh proportions, the meeting was finally adjourned at 8:36.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** Field Trip to Ashland

**Date:** March 28, 2024

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**SUMMARY**

The Middle School class would like to take a 3-day (April 9th-April 12th) 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, April 9th, 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, April 12th.

Costs for the trip will be covered by parents, fundraising, and funds designated in our 2023-2024 LCAP.

**ACTION REQUESTED**

Approve trip.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** Field Trip to the Forebay Aquatic Center

**Date:** March 28, 2024

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**SUMMARY**

April's Upper Elementary class would like to take an overnight field trip to the Forebay Aquatic Center in Oroville on April 25th.

**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.

April's Upper Elementary class would leave Sherwood on the morning of Thursday, April 25th, traveling by private vehicles to the Forebay Aquatic Center in Oroville. They will return to Sherwood on the morning of Friday, April 26th.

Costs for the trip will be covered by parents, fundraising, and funds designated in our 2023-2024 LCAP.

**ACTION REQUESTED**

Approve trip.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** March 28, 2024

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*Instructional Staff Report prompt for this month was: Please tell the Board about how things are going with your classes.*

**Transitional Kindergarten/Kindergarten -Teresa Shippen**

Spring is here...at least on some days! As we make the shift to the new season, I find myself taking time to reflect on where we've been and where we are headed. The students always return from break refreshed, taller and happy to see one another! Sometimes they are even missing a tooth! I notice how far we have come and how much we have grown as a class and community since our first days together.

This month I am feeling especially grateful to all who have aided and encouraged our growth this year and throughout the years. To start with, I am grateful to our Instructional Aides. They are reliable and bring such positive energy and light to our kids and our classrooms. They are flexible, willing helpers in so many ways. They bring with them a wealth of knowledge and a desire to learn and grow. I have really enjoyed working with them this year.

I am also grateful to our community members who reach out to enhance our learning and keep us in touch with all that is going on in our college town. Susan Tchudi, who encourages our participation in the Endangered Species Faire has always inspired me with new thoughts, ideas and her willingness to support us in any way we need. She works with joy, to help us complete our puppets year after year. What a wonderful person to have in our community! We also have our friends at Laxson Auditorium--Coz and her crew at Chico Performances. They bring quality theater and music programs each year. She even nudges me a bit when I am slow to sign up for a trip or two. These performances have broaden our experiences. Also on this list are Keith and Joy Book, who send out notices about Field Trips to the Pumpkin Patch starting in August. They have always felt warm and welcoming to our Sherwood students. A day on the Books Farm with this family is such a treat! This month my friend Amber Tomagni will again bring the magic of incubating eggs so we can all watch the miracle of life! I will never tire of the excitement, and worry, as little chicks try to peck their way out of their shells. What a gift she shares with us! I also want to include the countless people who spend hours arranging our library, Fall Festival, Winter performance etc. I can't name them all but they all enrich our lives.
I am grateful for the thoughtful, engaged parents who bring their students, and their talents to us in so many ways.

To this list, I would like to add all the professionals I am blessed to know and work with. From my friends, who are also teachers in our community and surrounding communities, to the group

we work with in the NorCal Leadership consortium, it is wonderful to hear what others are experiencing and how they are problem solving our unique North State issues.
The core of our school, Michelle, the office staff, our professional support team, and my colleagues work together to form the heart of our school. We can be so different, yet at heart have the same goal. Working together, we try to understand, and encourage all who are in our community.

And of course, Pat and the Board of Directors, who work to ensure that things are running as smoothly as possible. I appreciate the time and thought you put into all the nuances of our school. It takes a village to enhance the lives of our kids. Thank you

**Transitional Kindergarten/Kindergarten -Adam Mankoski**

On Thursday this week, my class will dye eggs, an annual tradition for my classes since I started teaching. It's a ritual that for me marks the beginning of my favorite seasons, warm weather, park walks and nature study.

This year I have a group of students who thrive when they can be in motion, outdoors. So, it had been fun to experiment with a fluid culture in our environment. Once procedures were established for all areas of the campus, students are allowed to utilize the whole environment during the work period, including art supplies, indoor movement equipment, the outdoor play equipment, garden area and sandbox.

In general, students working indoors are respectful and maintain a volume that allows others to work. Outdoors, I am working on some procedures to help maintain respectful levels.

We also have established that at any time during the work period, they may be called to work with me, individually or in small groups, on language or math. The combination of freedom and firm boundaries about working in those subject areas seems to work well.

I have found that students are more willing to work in these two academic areas if they have freedom within the environment, and choice of work otherwise. I also have found that I am able to have more concentrated, quality time with each student and monitor their progress in these subjects more carefully.

It is a model that I hope to continue next year. In order for it to be more successful, especially in light of increased enrollment, I must have consistent paraprofessional help. This model only works with proper supervision of multiple areas of our campus.

I also advocate that we add more stimulating equipment at 1010 to provide some diversity of play outside. That could include developmentally appropriate equipment for balance, and vertical structures for climbing.

We also need a dry outdoor area, so students can move outside when weather prohibits regular outdoor play. It's essential if we are to accommodate 40 students next year.
I appreciate the ability to experiment in my environment, the flexibility I have to adapt to my students' needs and the trust you have in me. Many thanks for the opportunity to serve the community.

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

Michelle shared with us that our topic this board report can be written around how things are going in our classes.

Considering enrollment it has been an unusual year. I have had many students join and leave my classroom. When students have left my classroom, they have left Sherwood, which always feels like a loss. I have a very small first year group, three students. My second year group and third year group are similar in size, each group has seven students. That being said, because of Individual Education Plans and learning differences I have a core of eight students at the first level of learning in nearly all direct instructional activities. Of the seven students enrolled in my classroom at the third level of learning, equivalent to third grade in traditional schools, just one has been with me since he was in first grade. He also attended Kindergarten at Sherwood. He is well prepared to show his knowledge on the California Assessment of Student Performance and Progress when our school begins testing. If we were to look at the enrollment of my classroom compared to the enrollment of the other lower elementary classroom, we would see a discrepancy in balance concerning grade level/learning level cohorts and students with documented learning differences. I am hopeful that in the future, next year, equity is sought in these areas.

Considering intervention and acceleration, identifying children that need support and developing sustainable systems to provide that is important to me. Juliette and I work together to use the math intervention tool provided for us to help children grow. That tool is IXL, a subscription-based learning site. We have just completed our second session of a 6-week intervention block. During this block of intervention students who demonstrate the need for extra math support practice 20 minutes, four days a week, on skills that are one year below their current enrollment levels or skills that have been taught in the classroom and continue to be difficult to master. We were happy to see significant growth from participants from October to December. We just completed an evaluation of the growth made from January through March and are still seeing progress for most participating students. We began our last intervention cycle this week and will complete it by the first week in May. Language Arts/Reading intervention has not been consistent this school year because of staffing issues. Juliette and I will attempt to rectify that by using the language arts/reading portion of IXL along with math for a few of our students needing more support.

Other than that…prep for paper packed puppets, a field trip, three afternoons a week for singing and art lessons with the other lower elementary class, a new novel, a weekly guest teacher/parent. It's a lovely, challenging class. Everyone, including myself, has learned a lot.

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

Those who've read my previous Board Reports may note that my last one was my first time critiquing any school operations. Usually, I just share my own interpretation of Montessori philosophies or celebrate small victories in my own classroom. I want to return to that custom in this Report, but also summarize the responses I received from my last Report.

Here are three small victories I'm celebrating after troubleshooting them extensively in my classroom: improved attendance, decreased line fights, and safer chair use. What works?

To improve attendance, I went from a relaxed, slow-starting morning routine to a more rigorous and organized one. Initially when I came to Sherwood, we started our day seated around the rug singing. Unfortunately, that made tardy students feel they could slip in at any time "without missing anything." So I gradually changed our routine in many ways. Now, I meet students at the door in three short grade-level lines. Together, we discuss how many people we expect, count how many are present, compare, and determine who's missing. We edit the door

magnets to show who's there and who's not, let the grade level with the best attendance wash their hands first, and then sit down, take attendance and start our day immediately. I also immediately have the student Lunch Manager count the number of school lunches we need. Now that we do it this way, most students arrive on time. What improved our attendance? Student awareness and ownership.

To reduce line fights, I took two measures: I installed full-body mirrors along the cupboards where students line up, and I started to fill our wait time with call-echo chants. It turns out that students given the choice would rather look in a mirror than fight each other. They also prefer clapping along to syllables and repeating fun words rather than arguing.

For safer chair use, I've changed our chairs. Though the straight-backed wooden chairs we used to have were charming, they proved unsafe. Students who tilted backward in them were prone to falling all the way over, breaking the chairs and potentially their heads. I switched to metal stools which are impossible to tilt, and which have an added bonus of being easy to tuck all the way under desks when not in use.

As minor as they may seem, these three victories have greatly improved quality of life in my classroom. I need to remember to celebrate that it's gotten so much easier than it used to be. Woohoo!

Now, in the spirit of more incremental improvement, to follow up on my last Board Report: Thankfully, some of the concerns were addressed! With Michelle's leadership, our staff was able to troubleshoot our cafeteria line management and renew our commitment to safe student walkways. Many times since, I've overheard different colleagues giving reminders and encouragement to students, and it feels like we're finally working on this as a team. Kids are responding positively to it, too.

Meanwhile, my concern about negative entertainment choices (books and movies with aggressively antisocial themes) has not been answered, but I trust it's being considered by our board and school community. In our limited space and time, we should be carefully curating our entertainment to make sure it's aligned with Montessori philosophy. As for food choices? I trust we can get back to following our own Family Handbook, and that's what I'm still using as my guide.

A surprisingly fraught topic, however, was slime. In response to my suggestion that bread dough was more Montessori-compatible than slime, our Wellness department warned that any public discussion "could negatively impact students seeking support." Wellness defended slime use as "well researched...and honestly just plain fun." I came away from that open-ended dialogue with unanswered questions, including: Fun for whom? Is slime any better researched than Montessori sensorial materials? Is slime's "relaxing" effect from serotonin (satisfaction), or dopamine (dependency) brain chemicals? And perhaps most importantly, if we have to bribe kids with slime to get them to use therapy, is the therapy really proving its own value?

I think: Slime is not a Montessori material. Extrinsic rewards are not a Montessori practice. Counseling practices at a Montessori school should uphold, not undermine, Montessori. And counseling practices at a public school should be open for public discussion. And that is much more than I initially intended to say about slime.

In closing, here's a fun riddle: Some people don't think our classroom has a pet, but we do! Our pet has 6 legs. Our classroom is the only one at Sherwood that has this pet. Our pet doesn't need to be fed, but you can play with it. It only moves or makes noise when you touch it. Its call can be high or low, loud or soft. What is our classroom pet?

A piano!

Thank you for listening.

**4th /5th/6th -Jessi Lusardi**

There are two things I would like the board to know about, which you are probably all aware of already. One, this year we seem to have an elevated amount of students with major emotional needs in our classes. In my classroom, some of the students who have major emotional needs have caused huge disruptions and dysregulation in the class as a whole. I think that the wellness staff, our administrators, our teachers, and LC staff are doing all they can to help these students and address their needs and their families' needs, however, because we are not a therapeutic environment, there are limitations. I am not sure how to move forward and problem solve on how to address these student emotional needs, but I do believe that they will keep growing in the coming years.

Two, I want to support an idea that Michelle brought up a few weeks ago about getting a locking gate to replace the gate which faces 20th street park. Anything that you as a board can do to support that would greatly benefit the overall safety of Sherwood.

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

**7th/8th-Stacy Gertz**

I am happy to share that my split roles here at Sherwood have been working out quite well in most regards. The students are embracing my structure and accountability responsibly!

All of my reading groups seem to be cohesive and progressive. The students appear to enjoy coming. We are focusing on reading strategies and word structure on many different levels modeled by Montessori Pathways. This provides opportunity for all types of learners. (auditory, visual, kinesthetic-just to name a few).

I am excited about our Ashland field trip to the Shakespeare Festival. We are learning about Shakespeare in class, and I hope to finish one play before the trip with my readers theater material. This will provide background knowledge for students to have a better understanding of the plays.

In addition, we just started a 5-paragraph persuasive essay. We are taking this in small steps. All students have selected their topics and met the first deadline. These essays provide a platform for them to apply their vocabulary and figurative language that we have worked hard on all year.

Another interesting event that I am working on- is a "Career Day." I have had success in the past with parents and community members coming in to talk about their career paths. Students will make posters to coordinate with the professions. They will have the opportunity to Interview the participants. They will formulate the questions with class activities. This will be in May.

We finished our novel : "Blood on the River" which gave them a first-hand experience on the 13 colonies and crossed over with U.S. history.

Their final exams were impressive! I was not surprised because they were ALL totally engaged with the book!

I love what I do, and I am looking forward to returning next year! I love the grade

combinations and exposure to younger students because when I get to have a continuous opportunity with students, I'm a "leg up" on individualizing, and it's a win-win! I am grateful to have the support of Leslie and Kimberly from our Learning Center daily, and we collaborate every day on our students' behalf.

Thank you for allowing us to have a voice!

**Learning Center-Leslie Carey**

Things are going very well in my classes. I teach 5 small groups, and provide push in Specialized Academic Services to one classroom. Throughout the week I attend different meetings including Nor CAL ELC, COST, and PBIS. All of these meetings focus on supporting students. I also have the opportunity to attend Professional Development in a lot of different educational areas. In addition, I also am the case carrier for IEP students, as well as test students' with suspected disabilities. Although I have many different roles and responsibilities, my favorite parts are interacting with my current students as well as determining if students at the school qualify for an IEP. The reason I like the process of determining if a student is eligible for an IEP is because whether or not they do qualify, it makes me happy to know that they will have more support. For example, some students are achieving at a lower level than expected in Math or Reading, so they get tested for a learning disability. A lot of times, after testing they don't have a learning disability but still need academic support. The general education teacher, the rest of the IEP team and I will brainstorm ways that we can support that child. More times than not, they will receive an SST which is a Student Study Team and includes accommodations and goals for the student, similar to an IEP. I feel proud to be a part of a team at Sherwood Montessori that doesn't let any student fall through the cracks.

For the students who are already identified as having an IEP, I have the pleasure of leading small group lessons to help them target their IEP goals. I love how measurable their goals are; I'm constantly tracking students' growth on their goals and I get excited about growth, no matter how small. Through my groups, I get to know my students so much more personally than when I was teaching general education. I have the opportunity to provide smaller group instruction, which is so beneficial to some students' learning. There are many laughs, bonding moments, and joyful interactions. In addition, there are some tough behaviors, but through my trainings, and collaborating with staff and the director, I feel more capable of providing de-escalation strategies and calming strategies to my students. My goals are for students to learn academics, but also to create happy memories at school, and have the social emotional skills to be able to thrive in all aspects of their life. I hope to be a calming and safe place for them to grow.

**P.E.-Kevin Paz**

Over the course of this school year, the Physical Education (PE) program at Sherwood Montessori has undergone significant evolution, reflecting our commitment to holistic student development. Embracing a dynamic approach, we have integrated diverse activities to engage students at various levels of physical ability and interest. From traditional sports to mindfulness exercises and cooperative games, our PE curriculum has become more inclusive and reflective of the diverse interests and needs of our student body. This evolution has yielded tangible

impacts, including enhanced physical fitness levels, improved teamwork and communication skills, and increased overall well-being among students. Looking ahead, our focus remains on fostering a positive and supportive environment for physical activity. Through continued collaboration with staff and students we aim to ensure that our PE program at Sherwood Montessori continues to thrive, nurturing the holistic development of our students for the remainder of the academic year and beyond.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** March 28, 2024

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**Administrative**

- Updated enrollment will be reported at the meeting.
- We are currently fully staffed but continue to seek more substitute teachers to add to our list as we have lost subs to full-time employment opportunities at other schools. We are also accepting applicants for a Montessori teachers pool to be prepared to hire for the 2024-2025 school year.
- I attended a Systemic Social-Emotional Learning professional development for administrators at the Butte County Office of Education. A team of three teachers will attend a two-day follow-up training in early April.
- Five teachers and I attended a two-part Verbal De-escalation training via Zoom presented by our SELPA (Special Education Local Plan Area).

**Legislative**

- I attended the *Superintendent's Panel on Charter Schools* on February 23 which had a panel of representatives sharing data on charter schools with the intention of shaping future policy and programming. A takeaway was the conclusion of an independent research consortium that current policy for charter schools is effectively supporting continuous improvement with a balance of flexibility and accountability.
- Our SELPA presented a special education legal forum with five hours of content related to special education law which I attended in early March.

**Community & Promotion**

- Sherwood will soon have a billboard on Mangrove for the months of April and May. It will be relocated to Esplanade for the month of July.
- We have continued to have well-attended school tours that conclude with parents requesting application materials.

- We had a well-attended TK/K Open House with parents and young children from the neighborhood and wider community.
- In response to data collected from our PBIS (Positive Behavior Interventions and Supports) we had a schoolwide community celebration with the theme of promoting peace. Students chose an activity from a menu that included cooperative games, a cooperative art project, creating and coloring mandalas, learning about and practicing good sportsmanship, the art of giving compliments, and how to give words of encouragement. The middle school also performed a puppet show for kindergarten students with a theme of friendship.

**Safety**

- We had a First Aid and CPR training to get staff certified and to renew previously certified staff
- As a follow-up, teachers had naloxone (NarCan) training, and the school now has several doses of NarCan on site on the main campus and at 1010 Cleveland Ave.

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

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

**Date:** March 28, 2024

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of February 2024 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 677,157.17 as of February 29, 2024 for the checking account.
- The expenses in February were for the normal operating cost.

Profit & Loss

The February 2024 Profit & Loss report shows a Net Income of $ -299,375, which was offset by $ 120,666 LCF funds deposited in February 2024 along with $8,211 ELOP and $ 6,347 lottery funds. The actual Net Income for January 2024 is $ -164,151. The school has received BCOE Technology grant funds of $40,000 in February and a $21,000 refund of Comcast fiberoptic service cost through the e-Rate program.

- Cash Flow
  The school should end the year with a positive cash balance assuming the final ADA is greater than 95 and state revenues are not significantly reduced. P1 ADA is 107 which will be used to calculate and fund the current year.
  The Legislative Analyst's Office is projecting a deficit for 2022 and 2023 tax collections. This may result in a call back of funds received in 2022-23 and a reduction in 2023-24 apportionment. The Governor's initial budget for 2024-25 does not include a substantial reduction in allocations for either year but is subject to change at the May 2024 revise.

# Sherwood Montessori
## Profit & Loss YTD Comparison
July 2023 through February 2024

| | Jul '23 - Feb 24 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | 868,208 |
| **Total Income** | 868,208 |
| **Gross Profit** | 868,208 |
| **Expense** | |
| **1000 Certificated Salaries** | 380,034 |
| **2000 Classified Salaries** | 300,857 |
| **3000-Employee Benefits** | 222,628 |
| **4000-Books and Supplies** | 29,193 |
| **5000 Services/Other Op. Exp.** | 234,871 |
| **Total Expense** | 1,167,584 |
| **Net Ordinary Income** | -299,375 |
| **Net Income** | **-299,375** |

**1:50 PM**
**03/25/24**
**Accrual Basis**

# Sherwood Montessori
## Board of Directors - Vendor Payments Report
## February 2024

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 02/01/2024 | ACH | CharterSAFE | BILLED PREMIUM - LIABILI... | 5400-Liability Insurance | 3,129.00 |
| Check | 02/01/2024 | ACH | CharterSAFE | BILLED PREMIUM - WC 20... | 3601-Workers Comp | 1,487.00 |
| Check | 02/01/2024 | DBT | Facebook Ads | JOB AD - $2 X 3 | Advertising | 3.00 |
| Check | 02/01/2024 | DBT | Facebook Ads | JOB AD | Advertising | 2.00 |
| Check | 02/01/2024 | DBT | Facebook Ads | JOB AD | Advertising | 2.00 |
| Check | 02/01/2024 | ACH | Macquarie Equipment Capit... | Kyocera Copier Lease 2024 ... | Copier Lease | 223.00 |
| Check | 02/02/2024 | 7565 | Aripez, Vanessa . | JANUARY SICK PAY 3 HRS... | 3903-Other Employee Benefits | 82.50 |
| Check | 02/02/2024 | DBT | Facebook Ads | JOB AD | Advertising | 5.00 |
| Check | 02/02/2024 | DBT | Facebook Ads | JOB AD | Advertising | 7.00 |
| Check | 02/03/2024 | dbt | Facebook Ads | JOB AD | Advertising | 10.00 |
| Check | 02/03/2024 | dbt | Amazon.com | LEGO BLOCKS | Instructional Supplies | 89.83 |
| Check | 02/04/2024 | DBT | Facebook Ads | JOB AD | Advertising | 15.00 |
| Check | 02/05/2024 | DBT | Amazon.com | POPSICLE STICKS | Instructional Supplies | 23.28 |
| Check | 02/05/2024 | DBT | Costco | SNACKS | Food (Instructional) | 430.56 |
| Check | 02/06/2024 | 7566 | Adam Mankoski | SUPPLIES - REPLACES CH... | Instructional Supplies | 19.44 |
| Check | 02/06/2024 | DBT | Facebook Ads | JOB AD | Advertising | 25.00 |
| Check | 02/06/2024 | DBT | FoodMaxx | SNACKS-MARLO | Food (Instructional) | 10.98 |
| Check | 02/06/2024 | DBT | Office Depot | SUPPLIES | Office Supplies | 173.72 |
| Check | 02/07/2024 | EFT | California Water Service C... | SERVICE 2024 DEC-JAN | Water | 22.10 |
| Check | 02/07/2024 | 9801 | Marlo . Knox | Supplies | Instructional Supplies | 348.50 |
| Check | 02/08/2024 | DBT | USPS | | Postage | 68.00 |
| Check | 02/08/2024 | 9798 | Chico Country Day | NURSE CONTRACT INV 10... | Contracted Service | 1,298.72 |
| Check | 02/08/2024 | EFT | Kimberly Fellner | SUPPLIES | Food (Instructional) | 12.56 |
| Check | 02/08/2024 | 9800 | Advanced Document | INV 120696 | Copier Lease | 347.29 |
| Check | 02/08/2024 | DBT | Amazon.com | CALENDARS | Office Supplies | 19.55 |
| Check | 02/08/2024 | DBT | Amazon.com | BATTERIES | Office Supplies | 23.37 |
| Check | 02/08/2024 | 9799 | Barney James Kerr | HOURS 6 X 33.00 LCAP FA... | Contracted Service | 198.00 |
| Credit... | 02/09/2024 | | Microsoft | SUBSCRIPTION MONTHLY... | Software Licensing | 9.75 |
| Credit... | 02/09/2024 | | Microsoft | SUBSCRIPTION ANNUAL | Software Licensing | 162.00 |
| Check | 02/09/2024 | 9802 | Hernandez Cleaning Service | SERVICE 2024 FEB | Housekeeping Services | 3,910.00 |
| Check | 02/09/2024 | 9803 | Chavez, Amanda S | LIVESCAN | LiveScan and TB Test Servi... | 66.00 |
| Check | 02/09/2024 | DBT | USPS | MAILINGS | Postage | 8.00 |
| Check | 02/09/2024 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conferences | 100.00 |
| Check | 02/12/2024 | DBT | Amazon.com | SUPPLIES | Instructional Supplies | 24.67 |
| Check | 02/12/2024 | DBT | Amazon.com | HEADPHONES | Instructional Supplies | 90.92 |
| Check | 02/12/2024 | DBT | Facebook Ads | JOB AD | Advertising | 35.00 |
| Check | 02/12/2024 | EFT | PG & E | 2024 JAN | Electricity | 1,067.18 |
| Check | 02/13/2024 | 7567 | COSTCO VISA CARD | THRU 15TH PURCHASES 2... | SHERWOOD COSTCO VISA | 7,024.42 |
| Check | 02/14/2024 | EFT | Waste Management | SERVICE - 2024 JAN | Trash/Recycling | 140.44 |
| Check | 02/14/2024 | EFT | Comcast Business 9110 | SERVICE - 2024 JAN-FEB | Telephone, Landline | 188.04 |
| Check | 02/15/2024 | DBT | Facebook Ads | JOB AD | Advertising | 50.00 |
| Check | 02/16/2024 | DBT | Costco | SNACKS | Food (Instructional) | 253.98 |
| Check | 02/20/2024 | DBT | Facebook Ads | JOB AD | Advertising | 50.00 |
| Credit... | 02/21/2024 | | 1 & 1 Internet Inc. | Internet hosting IONOS - 202... | Website, Hosting | 54.00 |
| Check | 02/21/2024 | 9806 | North State Parent Magazine | DIRECTORY-COOP AD | Advertising | 460.00 |
| Check | 02/21/2024 | 9805 | CUSD | FUA INV24-00102 2024 JAN | CUSD FUA Charges | 1,945.15 |
| Check | 02/22/2024 | DBT | PANERA BREAD | UE PBIS | Food - Meetings | 41.73 |
| Check | 02/22/2024 | DBT | Costco | SNACKS | Food (Instructional) | 394.97 |
| Check | 02/22/2024 | 9807 | PARK AVENUE PEST CO... | SERVICE 2024 FEB | Pest Control | 85.00 |
| Check | 02/23/2024 | DBT | Verizon Wireless | 2024 SERVICE FEB | Telephone, Cellular | 94.56 |
| Check | 02/23/2024 | DBT | Amazon.com | PRIME MO. DUES | 5300-Dues and Membership | 16.23 |
| Check | 02/24/2024 | DBT | Amazon.com | SUPPLIES | Instructional Supplies | 16.23 |
| Check | 02/25/2024 | DBT | Safeway | MISTER CLEAN MAGIC ER... | Custodial Supplies | 14.05 |
| Check | 02/26/2024 | DBT | Facebook Ads | JOB AD | Advertising | 50.00 |
| Check | 02/26/2024 | DBT | Facebook Ads | JOB AD | Advertising | 250.00 |
| Check | 02/26/2024 | DBT | Amazon.com | LEARNING CENTER SUPP... | Instructional Supplies | 292.73 |
| Check | 02/27/2024 | DBT | Woodstocks Pizza | CPR TRAINING | Food - Meetings | 104.01 |
| Check | 02/28/2024 | EFT | Comcast 4454 | SERVICE - 2024 FEB | Internet Service Provider | 471.67 |
| Check | 02/29/2024 | DBT | Wufoo | SERVICE - 2024 JAN 24-FEB | Online List Management | 19.00 |
| Bill | 02/29/2024 | 2023/2... | Pat Casey | CONTRACT SERVICES - 20... | Business Manager Services | 4,700.00 |
| Check | 02/29/2024 | DBT | Facebook Ads | JOB AD | Advertising | 29.68 |
| Check | 02/29/2024 | DBT | Amazon.com | LEARNING CENTER SUPP... | Instructional Supplies | 98.91 |
| **TOTAL** | | | | | | **30,394.72** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Formal Complaint Procedures**

**Date:** March 28, 2024

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**SUMMARY**

The Board will discuss the School's formal complaint policies and procedures.

**DISCUSSION**

Sherwood's current board adopted policies and procedures regarding complaints can be found in the Employee Handbook and the Parent Complaint Policy. Relevant excerpts and supporting documents are attached.

**ACTION REQUESTED**

Discuss complaint policies and procedures.

**Attachments**: Excerpts from the 2023-2024 Sherwood Montessori Employee Handbook, Parent Complaint Policy, complaint documents

**Excerpts from the 2023-2024 Sherwood Montessori Employee Handbook:**

## EQUAL EMPLOYMENT OPPORTUNITY

Sherwood Montessori is an equal opportunity employer. In accordance with applicable law, the School prohibits discrimination against any employee or applicant for employment on the basis of an individual's protected status, including race (which includes historically associated traits, such as hair styles and protective hairstyles, e.g., braids, locks, and twists), color, religious creed (which includes, without limitation to religious dress and grooming practices), gender, gender identity, gender expression, transgender identity whether or not the employee is transitioning or has transitioned, national origin (which includes, but is not limited to, national origin groups and aspects of national origin, such as height, weight, accent, or language proficiency), ancestry, physical disability (including HIV and AIDS), mental disability, medical condition (including cancer and genetic characteristics), genetic information, age (forty (40) and over), sexual orientation, marital status, registered domestic partner status, sex (which includes pregnancy, childbirth, breastfeeding, and related medical conditions), reproductive health decision-making (including but not limited to a decision to use or access a particular drug, device or product or medical services for reproductive health), military or veteran status (including state and federal active and reserve members as well as those ordered to duty or training), immigration/citizenship status or related protected activities (which includes undocumented individuals and human trafficking), protected medical and other protected leaves, domestic violence victim status, political affiliation, or any other consideration protected by applicable law. These categories include a perception that the individual has any of these characteristics or is associated with a person who has (or is perceived to have) any of these characteristics. The School will ensure that applicants and employees are treated in all aspects of employment without unlawful discrimination because of these or any other protected basis. Such aspects of employment include, but are not limited to, recruitment, hiring, promotion, demotion, transfer, layoff, termination, compensation, and training.

To comply with applicable laws ensuring equal employment opportunities to qualified individuals with a disability, the School will make a good faith effort to provide reasonable accommodations for the known physical or mental limitations of an otherwise qualified applicant or employee with a disability, unless undue hardship would result to the School. An applicant or employee who believes they requires an accommodation in order to perform the essential functions of the job should contact the School Director and request such an accommodation, specifying what accommodation they need to perform the job. Although the need for accommodations is determined on a case-by-case basis, generally Sherwood Montessori and the employee or applicant will engage in an interactive process with the employee's or applicant's health care provider(s) to confirm the existence of the condition, its limitations in the workplace, and possible reasonable accommodations, if any. The employee or candidate has an obligation to cooperate with Sherwood Montessori in this process, which may include authorizing Sherwood Montessori to communicate with their health care provider(s).

If you believe you have been subjected to discrimination, please follow the complaint procedure outlined below.

## HARASSMENT

It is the policy of Sherwood Montessori to ensure equal employment opportunity without harassment on the basis of race (which includes historically associated traits, such as hair styles and protective hair styles, e.g., braids, locks, and twists), color, religious creed (which includes, without limitation, to religious dress and grooming practices), gender, gender identity, gender expression, transgender identity whether or not the employee is transitioning or has transitioned, national origin (which includes, but is not limited to, national origin groups and aspects of national origin, such as height, weight, accent, or language proficiency), ancestry, physical disability (including HIV and AIDS), mental disability, medical condition (including cancer and genetic characteristics), genetic information, age (forty (40) and over), sexual orientation, marital status, registered domestic partner status, sex (which includes pregnancy, childbirth, breastfeeding, and related medical conditions), reproductive health decision-making (including but not limited to a decision to use or access a particular drug, device or product or medical services for reproductive health), military or veteran status (including state and federal active and reserve members as well as those ordered to duty or training), immigration/citizenship status or related protected activities (which includes undocumented individuals and human trafficking), protected medical and other protected leaves, domestic violence victim status, political affiliation, or any other consideration made unlawful by federal, state, or local laws, ordinances, or regulations. These categories include a perception that the individual has any of these characteristics or is associated with a person who has (or is perceived to have) any of these characteristics.

Sherwood Montessori prohibits any such harassment in the workplace. In addition, we prohibit abusive conduct/workplace bullying in the work environment. It is our mission to provide a professional work and learning environment free of harassment, discrimination and/or workplace bullying and that maintains equality, dignity, and respect for all. This policy protects all employees of the School as well as interns, volunteers, and potential employees (applicants). All employees of the School are required to abide by this policy, regardless of position or status, including supervisors, administration, and co-workers. In addition, this policy prohibits unlawful harassment by third parties, including students, parents, vendors or other third parties, who have workplace contact with our employees.

Conduct prohibited by these policies is unacceptable in the workplace and in any work-related setting outside the workplace, such as during business or field trips, meetings and business or school-related social events.

1 What is Harassment?

Harassment can take many forms. As used in this Employee Handbook, the term “harassment” includes all unwelcome conduct that comprises the following behavior pertaining to any of the above protected categories or characteristics:

Unlawful Harassment: Prohibited unlawful harassment may include, but is not necessarily limited to, the following behavior pertaining to any of the above protected categories:

- Verbal conduct such as flirting, epithets, derogatory jokes or comments, voicemails, slurs or unwanted sexual advances, sexually suggestive innuendos, conversations regarding sexual activities, invitations, or comments (including, but not limited to, threats of deportation against applicants and employees and family members of applicants and employees, derogatory comments about immigration status or disability, or mockery of an accent or a language or its speakers) ("hostile work environment" harassment).
- Disrespectful or unprofessional conduct based on any of the protected categories listed above ("hostile work environment" harassment).
- Comments or conduct that consistently target one gender, even if the content is not sexual ("hostile work environment" harassment). ○ Visual conduct such as derogatory and/or sexually oriented posters, photography, cartoons, drawings, gestures, text messages, posts, social media, instant messages, e-mails, letters, pictures, or gifts ("hostile work environment" harassment).
- Physical conduct such as assault, unwanted touching, intentionally blocking normal movement, or interfering with work because of any protected basis ("hostile work environment" harassment).
- Threats and demands to submit to sexual requests or sexual advances as a condition of continued employment or to avoid some other loss and offers of employment benefits in return for sexual favors ("quid pro quo" harassment).

- Communication via electronic media of any type that includes any conduct that is prohibited by state and/or federal law and/or school policy. ○ Sexually harassing conduct does need not to be motivated by sexual desire to be unlawful or to violate this policy and may include situations that began as reciprocal relationships but later ceased to be reciprocal.

2 <u>What is abusive conduct/workplace bullying?</u>

- Conduct of an employee in the workplace that a reasonable person would find hostile, threatening, intimidating, humiliating and unrelated to an employer's legitimate business interests. Examples may include: ○ Use of derogatory remarks, insults and/or epithets
  - ○ Verbal or physical conduct that sabotages or undermines a person's work performance that is threatening, humiliating or intimidating
- Bullying, gossip, profanity, abusive conduct and negative comments are destructive to our School culture, create false rumors, disrupt school operations and interfere with the privacy of others.

## 3 What is Retaliation?

Retaliation against an individual for reporting or threatening to report harassment, discrimination or for participating in an investigation of a claim of such conduct is a serious violation of this policy and, like harassment or discrimination itself, will be subject to disciplinary action. Acts of retaliation should be reported immediately and will be promptly investigated and addressed.

As used in this policy, "retaliation" means taking any adverse employment action against an employee because the employee engaged in protected activity pursuant to this policy. Protected activity may include, but is not necessarily limited to, reporting or assisting in reporting suspected violations of this policy, cooperating or participating in investigations or proceedings arising out of a violation of this policy, or engaging in any other activity protected by applicable law.

As used in this policy, an "adverse employment action" means conduct or an action that materially affects the terms and conditions of the employee's employment status or is reasonably likely to deter the employee from engaging in further protected activity. Adverse employment actions may include, but are not limited to, the following: demotion; suspension; reduction in pay; denial of a merit salary increase; failure to hire or consider for hire; refusing to promote or consider for promotion because of reporting a violation of this policy; harassing another employee for filing a complaint; denying employment opportunities because of making a complaint or for cooperating in an investigation; changing an employee's work assignments for identifying harassment or other forms of discrimination in the workplace; treating an employee differently such as denying an accommodation; not talking to an employee (the "cold shoulder") when otherwise required by job duties; or otherwise excluding the employee from job-related activities because of engagement in activities protected under this policy.

Any retaliatory adverse action because of a protected activity will not be tolerated. If an employee believes they have been subjected to, has witnessed, or has knowledge of retaliation in violation of this policy, please follow the complaint procedure outlined below.

## 4 Responsibility

All Sherwood Montessori employees have a responsibility for keeping our work environment free of harassment, discrimination, retaliation and abusive conduct in accordance with this policy.

## 5 Reporting

Sherwood Montessori strongly encourages reporting of all perceived incidents of discrimination, harassment, abusive conduct or retaliation, regardless of the offender's identity or position. Individuals who believe that they have been subjected to such conduct should immediately discuss their concerns with their immediate supervisor, or the School Director. All employees who witness potential violations of this policy, and particularly supervisors, are required to immediately report such incidents to the School Director. Supervisors must report any and all conduct of which they are made aware, which violates, or may violate, policies regarding discrimination, unlawful harassment, or retaliation to the School Director as appropriate. Supervisors who fail to report alleged violations may be subject to disciplinary action, up to and including termination. There is no requirement to report your complaint to any designated supervisor within Sherwood Montessori. Select the individual supervisor with whom you feel the most comfortable discussing your complaint. Do not

report your complaint to any individual who has allegedly engaged in the inappropriate behavior that is the subject of your complaint.
Every effort will be made to keep such reports as confidential as possible, although confidentiality cannot be guaranteed. Sherwood Montessori is serious about enforcing its policy against discrimination, harassment and retaliation; however, Sherwood cannot resolve potential violations that it does not know about. Therefore, employees are responsible for bringing any such problems to Sherwood Montessori's attention so it can take whatever steps are necessary to correct the problems.
All complaints submitted pursuant to this policy can be done in writing or verbally. Your complaint should be specific and should include the names of the individuals involved, the names of any witnesses, and any supporting documentation. Employees may choose to submit their complaints anonymously by filling a Google Form: Anonymous Complaint Form. The form will not collect your email, but you must use a Sherwood Montessori domain email to submit the form.

Investigation/Complaint Procedure

All complaints of unlawful harassment, discrimination or retaliation will be promptly investigated. Sherwood Montessori encourages the prompt reporting of complaints or concerns so that rapid and appropriate remedial action can be taken before relationships become irreparably strained. Therefore, while no fixed reporting period has been established, early reporting and intervention have proven to be the most effective method of resolving actual or perceived incidents of harassment.

Sherwood Montessori's investigation methods will vary depending on the nature of the complaint, the allegations, the witnesses, and other factors. The investigation may include individual interviews with the parties involved and, where necessary, with individuals who may have observed the alleged conduct or may have other relevant knowledge. Confidentiality will be maintained throughout the investigatory process to the extent possible and consistent with adequate investigation methods and appropriate corrective actions. The School has a compelling interest in protecting the integrity of its investigations. In every investigation, the School has a strong desire to protect witnesses from harassment, intimidation and retaliation, to keep evidence from being destroyed, to ensure that testimony is not fabricated, and to prevent a cover-up. If the School reasonably imposes a confidentiality requirement and you do not maintain such confidentiality, you may be subject to disciplinary action up to and including immediate termination.

All employees are required to fully cooperate with Sherwood Montessori's investigation, which includes, but is not limited to, providing all pertinent information in a truthful manner, submitting pertinent documents in their possession, not interfering with the investigation in any manner, and maintaining an appropriate level of discretion regarding the investigation. Failure to do so may result in disciplinary action, up to and including termination.
During the investigation, Sherwood Montessori will provide regular progress updates, as appropriate, to those directly involved. Sherwood Montessori will strive to complete its investigation as efficiently

as possible in light of the allegations and will reach any conclusions based on the evidence collected and credibility of the witnesses.

Sherwood Montessori may investigate conduct in the absence of a formal complaint if the School has reason to believe that an individual has engaged in conduct that violates Sherwood Montessori policies or applicable law. Further, Sherwood Montessori may continue its investigation even if the original complainant withdraws their complaint during the course of the investigation.

Any conduct which Sherwood Montessori believes constitutes harassment, discrimination, abusive conduct, or retaliation in violation of this policy will be dealt with appropriately. Corrective action may include, for example, training, referral to counseling and/or disciplinary action such as warning, reprimand, withholding of a promotion or pay increase, reassignment, temporary suspension without pay or termination, as Sherwood believes is appropriate under the circumstances. Due to privacy protection, Sherwood may not be able to fully disclose its entire decision regarding corrective action to the complainant. False and malicious complaints of harassment, discrimination, abusive conduct, or retaliation as opposed to complaints, which, even if erroneous, are made in good faith, may be the subject of appropriate disciplinary action.

### 7 Conclusion

This policy was developed to ensure that all employees work in an environment free from harassment, discrimination, abusive conduct and retaliation. Any employee who has questions or concerns about these policies should talk with the School Director of Administrative Assistant.

If you believe you have experienced discrimination or harassment you may file a California Civil Rights Department ("CRD") or Equal Employment Opportunity Commission complaint. For information contact the CRD or EEOC. You may find their phone numbers online at www.eeoc.gov and www.calcivilrights.ca.gov, respectively.

### 8 Training Requirements

Sherwood Montessori requires all employees to abide by California's training requirements, which includes training within six months of hire and retraining every two years thereafter. Employees who fail to complete this required training will be subject to disciplinary action, up to and including termination.

## WHISTLEBLOWER POLICY

Sherwood Montessori is committed to maintaining a workplace where employees are free to raise good faith concerns regarding certain business practices, specifically: (1) reporting suspected violations of law, including but not limited to federal laws and regulations; (2) providing truthful information in connection with an inquiry or investigation by a court, agency, law enforcement, or other governmental body; and (3) identifying potential violations of Sherwood Montessori policy, specifically the policies contained in Sherwood Montessori's Employee Handbook.

An employee who wishes to report a suspected violation of law or Sherwood Montessori policy may do so by contacting the Board of Directors.

Sherwood Montessori expressly prohibits any form of retaliation, including harassment, intimidation, adverse employment actions, or any other form of retaliation, against employees who raise

suspected violations of law, cooperate in inquiries or investigations, or identify potential violations of Sherwood Montessori. Any employee who engages in retaliation will be subject to discipline, up to and including termination.

Any employee who believes that they have been subjected to any form of retaliation as a result of reporting a suspected violation of law or policy should immediately report the retaliation to one of the following: School Director and Administrative Assistant. Any supervisor, manager, or administrative staff that receives complaints of retaliation must immediately inform the School Director or Administrative Assistant.

Reports of suspected violations of law or policy and reports of retaliation will be investigated promptly and in a manner intended to protect confidentiality to the extent possible, consistent with a full and fair investigation. Information will be disclosed only as it is necessary to complete the investigation and resolve the matter. The School Director and a member of Sherwood Montessori management will conduct the investigation or designate other internal or external parties to conduct the investigation. The investigating parties may notify the concerned individuals of their findings as appropriate.

## OPEN COMMUNICATION POLICY

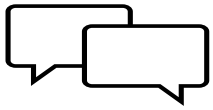
We want to hear from you. Sherwood Montessori strongly encourages employee participation in decisions affecting their employment and their daily professional responsibilities. Our greatest strength lies in our employees and our ability to work together. We encourage open communication about all aspects of our school and organization. Employees are encouraged to openly discuss with their supervisors any problems or suggestions they believe would make our organization better and stronger. Sherwood Montessori is interested in all our employee's success and fulfillment. We welcome all constructive suggestions and ideas.

Employees who have work-related concerns or complaints are encouraged to discuss them with the individual or individuals directly involved and/or the School Director. Employees are encouraged to raise their work-related concerns as soon as possible after the events that cause concern. Sherwood Montessori will attempt to keep the employee's concerns and complaints confidential to the extent feasible. However, in the course of resolving the matter, some dissemination of information to others may be necessary, appropriate, and/or required by law. Employees with concerns or complaints relating to harassment, discrimination or retaliation should follow the reporting procedure outlined in this Handbook.

SHERWOOD MONTESSORI

## Resolving Conflicts at Sherwood Montessori

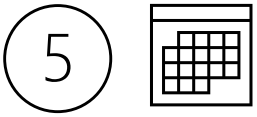
**Step 1**: Within 24-48 hours, address the problem with the person with whom you are in conflict. This can be in a meeting, or a request for a meeting (via email, by phone or written note



**Step 2:** If, after meeting with the individual, the conflict is unresolved, you may request formal paperwork to file a complaint from the office.



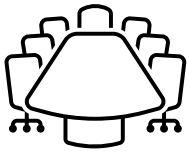
**Step 3:** The Director will meet with the complainant within 5 working days.



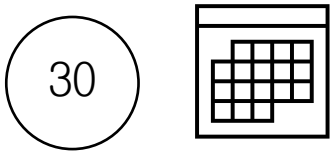

**Step 4:** The Director will respond in writing after the meeting within 10 working days.




**Step 5:** If the complainant is unsatisfied with the response, they can submit their complaint to the Board Chair.



**Step 6:** The Board will respond to the complainant within 30 days.




Reference: Parent Complaint Policy, updated and Board approved on 10.19.23.




Complaint Form

Name of parent/guardian:

Name of child:

Date of complaint:

Nature of complaint:

Parent signature: _____

Director’s written response to complaint:

SHERWOOD MONTESSORI

Unresolved Complaint

Name of parent/guardian:

Name of child:

Date of complaint:

Nature of complaint:

Parent signature: _____

Board of Director’s written response to complaint:

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** March 28, 2024

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**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)?

- 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?

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!

*For any "disagree" or "strongly disagree" responses, can you please explain why?*

1. I am happy to be at this school.

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

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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 am part of the school community.

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

5. The teachers at school treat me with kindness and respect.

| strongly agree | agree | neutral | disagree | strongly disagree |
|---|---|---|---|---|
| ☐ | ☐ | ☐ | ☐ | ☐ |

---

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

| strongly agree | agree | neutral | disagree | strongly disagree |
|---|---|---|---|---|
| ☐ | ☐ | ☐ | ☐ | ☐ |

---

7. The students at school 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 |
|---|---|---|---|---|
| ☐ | ☐ | ☐ | ☐ | ☐ |

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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 |
|---|---|---|---|---|
| ☐ | ☐ | ☐ | ☐ | ☐ |

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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:** **Second Interim Budget**

**Date:** March 28, 2024

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**SUMMARY**

Business Manager Pat Casey has prepared the Second Interim Financial Report.

**DISCUSSION**

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

| 2023-24<br>3-28-24 BOARD<br>2ND INTERIM BUDGET | FUNDING AT 95 ADA<br>105 Enroll. x 90% attendance<br>2023-24 1ST INTERIM BUDGET | FUNDING AT 107 ADA<br>114 Enroll. x 94% attendance<br>2023-24 2ND INTERIM BUDGET | CHANGE | | FUNDS TIED TO STATE DEFICIT |
|---|---|---|---|---|---|
| **Revenue** | | | | | |
| 8011 Local Control Funding | *635,820* | *646,533* | | | |
| 8012 Education Protection Act | *323,606* | *332,985* | | | |
| 8019 Prior Year Overpaid Adjustment | | | - | | |
| 8096 In Lieu Taxes | *298,606* | *298,606* | | | |
| Subtotal LCFF Revenues | *1,258,032* | *1,278,124* | 20,092 | *1.60%* | 1,278,124 |
| 8290 - TITLE I | | | | | |
| 8290 - TITLE I + ESSER TOTAL | **50,000** | **50,000** | - | | |
| 8181 - Spec. Educ.- SELPA Fed | 11,960 | 11,960 | - | | |
| 8311 - Spec. Educ. - SELPA State | 81,641 | 81,641 | - | | |
| 8312 - Spec. Educ. - SELPA ERMHS | 5,600 | 5,600 | - | | |
| 8550 - Mandates Block Grant | 2,500 | 2,500 | - | | |
| 8560 - State Lottery | 25,000 | 25,000 | 0 | | |
| 8590 - Educator Effectiveness-6266 | | | - | | |
| 8590 - ELOG-P | *50,000* | *50,000* | - | | 50,000 |
| 8590 - UPK | *34,000* | *34,000* | - | | 34,000 |
| 8590 - AMIM | | | - | | |
| 8590 - BCOE TECH GRANT | | *40,000* | 40,000 | | 40,000 |
| 8699 Other Local Revenue | 3,000 | 3,000 | - | | |
| **TOTAL REVENUES** | **1,521,733** | **1,581,825** | 60,092 | | *1,402,124* |
| | | | State Deficit | 6% | ***84,127*** |
| **Expense** | | | State Deficit | 12% | ***168,255*** |
| 1000 Certificated Salaries | 503,915 | 539,915 | 36,000 | 29% | |
| 2000 Classified Salaries | 522,866 | 486,866 | (36,000) | 27% | |
| 3000 Employee Benefits | 328,003 | 328,003 | - | 18% | |
| **SUBTOTAL** | ***1,354,784*** | ***1,354,784*** | - | 74% | |
| 4100 Texts and Core Curricula | 500 | 500 | - | | |
| 4200 Reference Materials | 3,000 | 3,000 | - | | |
| 4300 Materials and Supplies | 36,800 | 31,800 | (5,000.00) | | |
| 4400 NonCap Equipment | 3,000 | 6,000 | 3,000.00 | | |
| 4700 Food (Nutrition) | 800 | 5,800 | 5,000.00 | | |
| **SUBTOTAL** | ***44,100*** | ***47,100*** | 3,000.00 | 3% | |
| 5200 Travel and Conferences | 3,000 | 3,000 | - | | |
| 5300 Dues and Memberships | 2,000 | 2,000 | - | | |
| 5400 Property/Liability Insurance | 38,000 | 38,000 | - | | |
| 5500 Operations / Housekeeping | 94,900 | 94,900 | - | | |
| 5600 Rentals, Leases, and Repairs | 12,000 | 12,000 | - | | |
| 5800 Prof. & Consulting Services | 209,250 | 253,150 | 43,900 | 14% | |
| 5900 Communications | 28,200 | 27,400 | (800) | | |
| **SUBTOTAL** | ***387,350*** | ***430,450*** | 43,100 | 23% | |
| 6200 CAPITAL OUTLAY- BLDG | | | | | |
| **TOTAL EXPENDITURES** | **1,786,234** | **1,832,334** | **46,100** | 100% | |
| **Net Income** | ***(264,501)*** | ***(250,509)*** | **ADA Equiv.** | **-25** | |
| **Unassigned/Unappropriated - Prior Year** | **561,743** | **527,285** | | | |
| **Restricted Grant Funds - Prior Year** | **75,000** | **25,014** | | | |
| **Unassigned/Unappropriated - Yr End Proj..** | **297,242** | **342,285** | **ADA Equiv.** | **34** | |
| **Reserve - Economic Uncertainties** | **120,000** | **120,000** | **Est. 1 mos. salary/benes.** | | |
| **Other Designations** | **177,242** | **65,000** | **ADA Equiv.** | **7** | |
| **Restricted Grant Funds** | **75,000** | **25,014** | | | |

SHERWOOD MONTESSORI

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

Date/Time: **Thursday, May 16, 2024 – 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, Tina Hanson-Lewis, Kati Boomgarden, Emma Cluff, Sami Lawson

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

**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, March 28, 2024.

**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**

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.2.3 Treasurer Report**
**E.2.4 Chair Report**
**E.2.5 NorCal Educational Leadership Team**

**E.3 Action and Discussion Items** (6:50)

**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 Calendar Revision**
The Board will be asked to consider a calendar revision.
**Action Requested**: Approve revision.

**E.3.3 LCAP Federal Addendum**
The Board will be asked to approve the updated Federal Addendum.
**ACTION REQUESTED:** Approve the Federal Addendum.

**E.3.4 CARS Application**
The Board will be asked to approve the Consolidated Application for Federal Funding
**ACTION REQUESTED**: Approve application.

**F. CLOSED SESSION** (7:20)
**F.1 Public Employee Performance Evaluation**
With respect to every item of business to be discussed in a closed session pursuant to Government Code Section 54957. Title: School Director.

**G. FUTURE AGENDA ITEMS** (7:30)
The Board will be asked to adopt the 2024-2025 Local Control Accountability Plan (LCAP) and approve the Original Budget for 2024-2025.

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

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Regular Board Meeting
Date/Time: Thursday, March 28, 2024 – 6:00 p.m.
Location: 1017 E. 16th St., Room 1, Chico, CA 95928

A. Call to Order **(6:07)**
- A1 Land Acknowledgement read by Michelle **(6:07)**
- A2 Roll Call: Russell Shapiro, Tina Hanson-Lewis, Samantha Lawson, Kati Boomgarden, Emma Cluff

B. Consent Agenda **(6:10)**
- Consent agenda briefly discussed
- Motioned by Sam, Seconded by Kati, unanimously approved

C. No Public Comment
D. No Notices of Public Hearings
E. Regular Business
- E2 Reports and Communication **(6:15)**
    - E.2.1 Instructional Staff Reports **(6:21)**
        - Staff reports briefly discussed by board members
    - E.2.2 School Director's Report **(6:25)**
        - Michelle discussed Director's report
        - Current enrolment at 114
        - Tours going very well
    - E.2.3 Treasurer's Report **(6:29)**
        - Pat and the Board briefly discussed the Treasurer's Report
- E3 Action Items **(6:38)**
    - E.3.1 Formal Complaint Procedures **(6:38)**
        - Board discussed current complaint procedures. The board discussed areas to modify, and set goals for completing the modifications in the following areas:
            - Establishing a clearer chain of complaints for staff
            - Establishing a clearer procedure for staff conflict, and methods of enforcing those procedures.
            - Reviewing the language of "supervisor" as it is utilized within the employee handbook
        - Ad hoc committee formed of Tina and Sam to make these proposed edits
        - Ad hoc committee formed of Emma to investigate options for outside mediators who could step in in the incident of future conflicts
    - E.3.2 Community Surveys **(7:28)**
        - LCAP briefly discussed
    - E.3.3 Adoption of Second Interim Budget **(7:32)**
        - Motioned by Emma, seconded by Russell, unanimously accepted.
- E.4 Board Governance **(7:45)**
    - E.4.1 Elections Committee Update
        - Discussed options for recruitment arenas

F. Future Agenda Items - 2024-2025 LCAP

G. Closed Session **(7:57)**
H. Closed session Adjourned **(8:14)**

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** May 16, 2024

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*Instructional Staff Report prompt for this month was: What do you see as the value of off campus field trips?*

**Transitional Kindergarten/Kindergarten -Teresa Shippen**
Teresa will be at the meeting and will share in person!

**Transitional Kindergarten/Kindergarten -Adam Mankoski**
I think there is tremendous value in off-campus field trips. However, wish that we would allow our students to plan the 'going out,' a traditional Montessori approach. Students should be reaching out to make reservations and organizing their own transportation, planning itineraries and securing snacks. This is by design, a way for the leaders in a class to learn valuable social snd practical life skills.

In my opinion, 'going out' is more developmentally appropriate for 2nd plane children, so I have created a 'welcome in' environment in my class. Throughout the year, I invite parents and community members to come to us to share their talents. So far this year, we've been a guest at a neighborhood garden, and invited instructors to teach music, flow, martial arts, dance and art.

I plan to continue this next year.

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

**1st/2nd /3rd -Anne Adams**
Our field trips this year have all been to plays and one symphony concert at the Laxson, and we've found them very valuable! They give kids an impression of live performance they would never get from Youtube or other media. This opens up meaningful discussion about the elements that go into performing: confidence, preparation, practice, and listening. All of these are also important aspects of successful classroom participation, so I'm happy to undertake the extra effort to plan these events.

**4th /5th/6th -Jessi Lusardi**

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

Field trips are fun and provide opportunities for: learning in context, building relationships, exploring the community, and providing unique experiences. Every day there is a field trip, students come to school excited because they are enjoyable and provide a break in the daily routine.

There is no better way to learn than in context and class outings provide the space for experiential learning. While it is exciting to watch the fish eggs hatch and grow in the classroom, the real magic is when we get to release them into the river. After placing a fish in the water, students watch it either swim (always downstream) or start nibbling on algae. My students have a deeper appreciation for salmon than they would if we only read about them. Additionally, the salmon experience is something I can refer to in other lessons about ecosystems, human effects on environment, sustainability, etc.

When we went to the Big Time event at Butte College, students observed Native American prayers and dances. Vendors sold indigenous crafts and food. The majority of the people there were Native American. This day provided more real life examples of Native American culture than I could ever provide in the classroom. While this was the richest cultural experience I was able to provide for my students this year, the Laxson Auditorium and MONCA field trips also exposed students to different cultures.

Bringing students outside the comforts of the classroom builds relationships and provides ample opportunities for collaboration. When we visit Laxson for a performance, students travel together in private vehicles, where they have to decide seating arrangements and share space. Once cars arrive, students walk in a clump looking around for other members of the class, who excitedly wave them over once spotted. These brief interactions show students they are part of a community. Field trips often require students to work together to achieve a goal. For example, at the Forebay Aquatic Center, students must work together to travel successfully on a kayak, paddle boat or board. They also provide opportunities for students to spontaneously help each other. One of my students lost a shoe at the Forebay and several students tried hard to find it. These acts showed the student who lost a shoe that their peers care about them and the class community will support them. Feelings of belonging are critical to a person's success, which make moments like these invaluable.

Class outings are a way to connect students and their families to the community beyond school. After visiting the Gateway Science Museum or MONCA for a field trip, many students report returning to the location with their family. Field trips increase awareness of what our community has to offer. Also, there are families who do not have the resources to provide community experiences, so a field trip may be the only time the student is able to visit a local museum or park. I had two students who had never been camping before our field trip. Now they have leaking tents and s'mores stories to tell. Some students would not have these experiences without field trips.

Class field trips require extra work for the teacher and extra helping hands (and drivers). In my experience, the work I put into a field trip is always worth it because we have a good time, students engage in content in context, they collaborate, and we get to visit interesting places. Adventures outside the classroom are a highly valuable part of education.

**7th/8th-Stacy Gertz**

We had the privilege of experiencing 5 amazing field trips this year:

We attended two literacy opportunities to enjoy complimentary meals: (T-Bar and Woodstock's) and wrote restaurant reviews. We explored vocabulary, adjectives and persuasive writing response techniques with this motivating scenario. We were on Action News with the Literacy Luncheon Idea which enhanced our students' self-esteem and gave value and credibility to this idea. It showed students how our community can support us, and we were able to attain free press for both restaurants. The complimentary aspect created a win-win scenario.
In addition, we went to two music and cultural festivals at both Chico State and Butte Colleges. The Chico State event allowed us the insight the Mexican, iconic Mariachi Band-one of the top in our country performed. This gave enlightenment into a musical genre that dates back to the 18th century. The students were highly engaged! It was a great exercise opportunity to walk downtown on a beautiful fall day and, again, share a community meal that Michael and I treated our students to.
The Great Event at Butte College this spring was even more relatable because the performers connected and interacted with the audience (our students among) with games, raps and dancing from American Indian cultures. We were additionally educated by members of our class community whose grandma and mother had a booth at the festival. They shared their art culture and some of their history with us. One of the best parts of the trip was finding a booth that gave out FREE affirmation bracelets, stress balls and mini affirmation cards that we brought back into our classroom, and we shared a (bring your own) picnic lunch together on a beautiful day.
Most recently we were blessed to attend the Shakespeare Festival in Ashland, Oregon. First of all, we were extremely successful at fund raising this trip to the tune of $2940.00! with two Barnes and Noble weekends, A music event at Mulberry Street, two bake sales and a movie night. This 4-day field trip was more than any of us expected! Our students were able to experience guided independence, following a schedule, we were given suites this year at OSU! The freedom of choice during meals at the college had something for all of us. The three plays that we attended were engaging by all (the 3-hour play was a little long for them.) One of the highlights of our trip was an adventure to The Science Works Museum. It was great watching our students interact together and find their individual passions! We were able to provide pictures for our yearbook (I never saw them laugh and smile so much!) with lasting memories forever. Another engaging event was a scavenger hunt (treated and ignited by Sam Lawson) that provided historical information and competitive fun as we navigated through Lythia Park. Our fundraising allowed us to engage in two off-campus meals and a smoothie stop that everyone loved. The students also enjoyed two downtown shopping events. Yoga was offered each morning. Having several chaperones and Kimberly on a group chat allowed for great communication. Everything about this field trip was organized and executed to provide a

combination of education, arts, adventure, independence and community. It was great to see the compliance of all students on every level.

I truly believe that these field trips were of great value to our class community- Michael concurs!
Please visit our Career Day next week: 5/17; 10 am-12 pm.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** May 16, 2024

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**Administrative**

- Updated enrollment will be reported at the meeting.
- We had our Annual Site Visit from our authorizer with Chico Unified School District (CUSD) representatives. They were interested in our fiscal health and how we improved test scores dramatically in 2023.
- I have been attending meetings with CUSD to explore the possibility of a local school bond for facilities. The climate looks very favorable for passing a local bond, and it will mean $469,884 in funding for facilities for Sherwood if it passes.
- I have attended meetings with Butte County Office of Education to learn more about forming a consortium of schools that would collect funds from Medical with BCOE providing most of the office work for services we already provide.
- Our students in grades 3-8 are currently taking end-of-the-year standardized testing.

**Legislative**

- I attended a training on conducting compliant investigations hosted by our insurance provider.
- I did some professional development on implementing 504 Plans to keep current on in my role as administrator for special education.

**Community & Promotion**

- Sherwood currently has a billboard on Mangrove for the months of April and May. It will be relocated to Esplanade for the month of July.
- We are still conducting school tours that conclude with parents requesting application materials.
- Sherwood had a good showing with amazing puppets once again in the Procession of the Species at the 45$^{th}$ Endangered Species Faire at the downtown Chico City Plaza. Sherwood had a booth and promoted the school at the event.

- A theme that has emerged at the monthly Coffee with the Director is wanting more parent participation and a return of our traditional structure for SMPO.
- We had our annual Variety Show at the 1010 Cleveland campus with our amazing students showing off their myriad talents.

**Safety**

- I met with John Sclare, Construction Manager at CUSD, about installation of locked, buzz-in gates at both campuses. A representative from a company in the Bay Area that can do the work will be providing an estimate for the work. The work can be covered with Measure K funds.

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

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

**Date:** April 16, 2024, Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of April 2024 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 739,740.96 as of April 30,2024 for the checking account.
- The expenses in April were for the normal operating cost.

Profit & Loss

The April 2024 Profit & Loss report shows a Net Income of $ 78,943, with added amounts of $ 56,734 LCF funds deposited in May 2024 along with $8,211 for ELOP, $ 8,336 for Title I and $ 2,840 for Prop 28 Art/Music. The actual Net Income for April 2024 is $ 155,067.

Cash Flow

The school will end the year with a positive cash balance based on P2 ADA of 104.
The Legislative Analyst's Office and Governor are expecting a smaller deficit than originally announced in January 2024. The COLA for revenue limit calculations was 3.94% in the original Governor's budget but has been revised down to 1.07%. Final budget numbers will be announced with the May 2024 revise report.

# Sherwood Montessori
## Board of Directors - Vendor Payments Report
### April 2024

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Credit... | 04/01/2024 | | Chico U Lock It Self Sto... | MONTHLY STORAGE UNIT ... | Other Rentals | 130.00 |
| Check | 04/01/2024 | DBT | Facebook Ads | JOB AD | Advertising | 6.89 |
| Check | 04/01/2024 | DBT | Facebook Ads | JOB AD | Advertising | 1.95 |
| Check | 04/01/2024 | ACH | Macquarie Equipment C... | Kyocera Copier Lease 2024 ... | Copier Lease | 223.00 |
| Check | 04/02/2024 | DBT | Amazon.com | LINED PAPER | Office Supplies | 12.63 |
| Check | 04/03/2024 | 9820 | CUSD | FUA INV24-00126 2024 FEB | CUSD FUA Charges | 2,407.86 |
| Check | 04/03/2024 | 9821 | Advanced Document | SERVICE INV125552 MAR 2... | Copier Lease | 569.81 |
| Check | 04/03/2024 | 9822 | Hernandez Cleaning Se... | SERVICE 2024 MAR | Housekeeping Servic... | 3,450.00 |
| Check | 04/03/2024 | 9823 | PARK AVENUE PEST ... | SERVICE 2024 MAR | Pest Control | 85.00 |
| Check | 04/03/2024 | EFT | Comcast 4454 | SERVICE - 2024 MAR-APR | Internet Service Provi... | 471.67 |
| Check | 04/03/2024 | DBT | Costco | SNACKS | Food (Instructional) | 23.97 |
| Check | 04/03/2024 | DBT | Grocery Outlet | GREETING CARDS | Office Supplies | 29.04 |
| Check | 04/03/2024 | DBT | Amazon.com | MASKING TAPE | Instructional Supplies | 61.68 |
| Check | 04/03/2024 | DBT | Amazon.com | MASKING TAPE | Office Supplies | 20.56 |
| Check | 04/04/2024 | DBT | Costco | SNACKS | Food (Instructional) | 429.08 |
| Check | 04/04/2024 | 7588 | Marissa Bertagna | LIVESCAN | LiveScan and TB Tes... | 68.00 |
| Check | 04/04/2024 | DBT | NATIONAL CENTER F... | DONATION- ADVERTISING | Advertising | 26.34 |
| Check | 04/04/2024 | DBT | Association Montessori ... | Advertising | Advertising | 97.91 |
| Check | 04/05/2024 | 7589 | Jamie Williams | LIVESCAN | LiveScan and TB Tes... | 68.00 |
| Check | 04/05/2024 | 7590 | Laura Swanson | BCOE STIPEND | Contracted Service | 2,000.00 |
| Check | 04/05/2024 | EFT | California Water Service... | SERVICE 1010 CLEVELAN... | Water | 22.20 |
| Check | 04/08/2024 | 7591 | Laura Swanson {Other} | BH SUPPLIES - SNACKS | Instructional Supplies | 72.66 |
| Check | 04/08/2024 | DBT | MORGAN CHILDERS M... | AD - PAYPAL | Advertising | 49.00 |
| Check | 04/08/2024 | ACH | CharterSAFE | BILLED PREMIUM - LIABILI... | 5400-Liability Insuran... | 3,129.00 |
| Check | 04/08/2024 | ACH | CharterSAFE | BILLED PREMIUM - WC 202... | 3601-Workers Comp | 1,488.00 |
| Check | 04/09/2024 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Con... | 100.00 |
| Check | 04/09/2024 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Con... | 100.00 |
| Check | 04/09/2024 | DBT | Amazon.com | BEESWAX BLOCK CRAYONS | Instructional Supplies | 215.40 |
| Credit... | 04/09/2024 | | Microsoft | MONTHLY FEE - 2024 MAR... | Software Licensing | 69.00 |
| Check | 04/10/2024 | 7592 | CHICO MONTESSORI ... | FUNDRAISER AD ON T SHI... | Advertising | 75.00 |
| Check | 04/10/2024 | DBT | Costco | SNACKS | Food (Instructional) | 412.80 |
| Check | 04/10/2024 | DBT | USEFULCHARTS | CHARTS | Instructional Supplies | 28.99 |
| Check | 04/11/2024 | DBT | FoodMaxx | DAIRY-PRODUCE | Food (Instructional) | 23.87 |
| Check | 04/11/2024 | DBT | Office Depot | SUPPLIES | Instructional Supplies | 59.82 |
| Check | 04/11/2024 | DBT | Office Depot | STAMPS | Postage | 68.00 |
| Check | 04/12/2024 | 9824 | City of Chico | SERVICE - 2024 MAR | Sewer | 28.87 |
| Check | 04/12/2024 | 9825 | Chico Country Day Sch... | INV 10024-00254 APR 2024 | Contracted Service | 1,298.72 |
| Check | 04/12/2024 | EFT | Waste Management | SERVICE - 2024 MAR | Trash/Recycling | 140.44 |
| Check | 04/12/2024 | EFT | Michelle Yezbick | 504 TRAINING | 5200-Travel and Con... | 99.00 |
| Check | 04/12/2024 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Con... | 100.00 |
| Check | 04/12/2024 | DBT | Amazon.com | BUBBLE WRAP | Extended Day | 13.59 |
| Check | 04/12/2024 | DDBT | Amazon.com | CALIGRAPHY PENS | Instructional Supplies | 9.74 |
| Check | 04/12/2024 | DBT | Amazon.com | CRAFTS | Extended Day | 41.74 |
| Check | 04/15/2024 | DBT | Safeway | CLING WRAP | Instructional Supplies | 27.01 |
| Check | 04/15/2024 | DBT | Enterprise Rent-A-Car ... | ASHLAND FIELD TRIP- LCA... | 5200-Travel and Con... | 401.16 |
| Check | 04/15/2024 | DBT | Amazon.com | CALIGRAPHY PENS | Instructional Supplies | 9.73 |
| Check | 04/18/2024 | 9826 | Barney James Kerr | HOURS 15.5 X 33.00 LCAP ... | Contracted Service | 511.50 |
| Check | 04/18/2024 | 9826 | Barney James Kerr | PLAY GROUND SAND | Maintenance Supplies | 46.50 |
| Check | 04/18/2024 | 9827 | Stacy .Gertz | ASHLAND FIELD TRIP | Field Trips and Asse... | 238.38 |
| Check | 04/18/2024 | EFT | Comcast Business 9110 | SERVICE - 2024 MAR-APR | Telephone, Landline | 187.49 |
| Check | 04/18/2024 | EFT | PG & E | SERVICE MAR-APR 2024 | Electricity | 641.26 |
| Check | 04/18/2024 | EFT | Teresa Shippen | BUTTERFLY LARVAE - SUP... | Instructional Supplies | 201.09 |
| Check | 04/18/2024 | DBT | Wufoo | SERVICE - 2024 MAR-APR | Online List Managem... | 19.00 |
| Check | 04/19/2024 | 7593 | Marylee Lish | REFUND ASHLAND FEE | Ashland Trip | 157.00 |
| Check | 04/19/2024 | DBT | Amazon.com | ART SUPPLIES | Extended Day | 16.55 |
| Check | 04/22/2024 | EFT | COSTCO VISA CARD | THRU 15TH PURCHASES 2... | SHERWOOD COST... | 6,604.29 |
| Check | 04/23/2024 | DBT | Amazon.com | USB CABLE | Instructional Supplies | 7.57 |
| Check | 04/23/2024 | DBT | Amazon.com | MONTHLY FEE | 5300-Dues and Mem... | 16.23 |
| Check | 04/23/2024 | DBT | Amazon.com | GRAPH PAPER | Instructional Supplies | 19.29 |
| Check | 04/23/2024 | DBT | Verizon Wireless | SERVICE 2024 APR | Telephone, Cellular | 97.53 |
| Check | 04/24/2024 | 9830 | Steve Duke | INV 4-19-4 TECHNICAL SU... | Contracted Service | 385.00 |
| Check | 04/24/2024 | 9831 | RTI, Inc. | CUST 14-SHERWOOD - IN... | Ethernet - Fiberoptic | 4,643.93 |
| Check | 04/24/2024 | 9828 | CUSD | FUA INV24-00139 MAR 24 | CUSD FUA Charges | 2,372.25 |
| Check | 04/24/2024 | EFT | Jessica Lusardi | SNACKS | Instructional Supplies | 61.95 |
| Credit... | 04/24/2024 | | Mendes Supply Co. | DELIVERY CHARGE | Office Supplies | 5.00 |
| Check | 04/24/2024 | DBT | Costco | SNACKS | Food (Instructional) | 505.75 |
| Check | 04/25/2024 | DBT | Amazon.com | POSTERS - CAREER DAY | Instructional Supplies | 109.32 |

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 04/26/2024 | DBT | Costco | SNACKS | Food (Instructional) | 23.97 |
| Check | 04/26/2024 | DBT | Costco | SNACKS | Food (Instructional) | 121.23 |
| Check | 04/29/2024 | DBT | Office Depot | SUPPLIES | Instructional Supplies | 109.47 |
| Check | 04/29/2024 | DBT | FoodMaxx | DAIRY | Food (Instructional) | 12.49 |
| Check | 04/29/2024 | DBT | UPGRADED LIVING M... | AD IN UPGRADED LIVING ... | Advertising | 200.00 |
| Check | 04/29/2024 | DBT | Amazon.com | HOSE-LEAF BLOWER-STRI... | Maintenance Supplies | 231.88 |
| Check | 04/29/2024 | DBT | Costco | SNACKS | Food (Instructional) | 113.94 |
| Bill | 04/30/2024 | 2023/2... | Pat Casey | CONTRACT SERVICE APRI... | Business Manager S... | 4,700.00 |
| **TOTAL** | | | | | | **40,626.99** |

# Sherwood Montessori
## Profit & Loss YTD Comparison
April 2024

| | Apr 24 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | 242,727 |
| **Total Income** | 242,727 |
| **Gross Profit** | 242,727 |
| **Expense** | |
| **1000 Certificated Salaries** | 54,822 |
| **2000 Classified Salaries** | 44,122 |
| **3000-Employee Benefits** | 29,073 |
| **4000-Books and Supplies** | 3,078 |
| **5000 Services/Other Op. Exp.** | 32,689 |
| **Total Expense** | 163,784 |
| **Net Ordinary Income** | 78,943 |
| **Net Income** | **78,943** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** The Sherwood Montessori Northern California Educational Leadership Consortium Team: Leslie Carey, Teresa Shippen, Michelle Yezbick

**Subject:** **NorCal ELC Team Presentation**

**Date:** May 16, 2024

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Sherwood's NorCal ELC Team is in its second year of involvement with the continuous school improvement project hosted by California State University, Chico and presented by Abeo School Change. Members of the team are given stipends for the time we spend outside of our regular employment hours to work with educators all over Northern California to engage in continuous improvement for our school around a chosen problem of practice.

The members of the team would like to present to the Board a summary of the work we have done thus far for Sherwood.

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Local Control Accountability Plan (LCAP) Public Hearing**

**Date:** May 16, 2024

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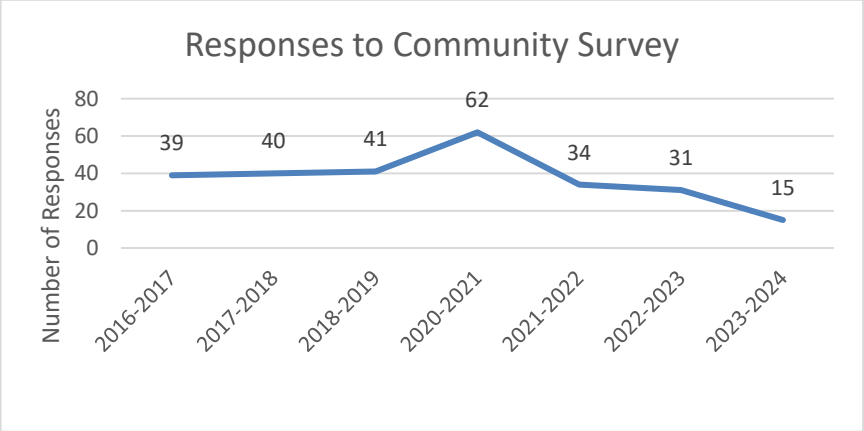
**SUMMARY**

The LCAP adoption process should have ample opportunities for a variety of educational partners to give input, including: students, parents, faculty, staff and community members.

**DISCUSSION**

The LCAP format includes a description of the process for engaging educational partners to gain input. A focus group has met to discuss our current LCAP and the course for developing our future adoption, 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.

Although promotion efforts have been similar to years' past, we have had a very low number of respondents for this year's survey:



We also do not yet have the student survey input. Overall, the draft of the LCAP has maintenance goals, very similar to prior years', as we have either met, surpassed, or made significant progress on all goals.

**ACTION REQUESTED**

Discuss LCAP and allow educational partners' input.

Attachments: LCAP Community Survey Report 2024, Draft of LCAP

# 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<br>Director | michelle@sherwoodmontessori.org<br>(530)345-6600 |

# Plan Summary [2024-25]

## 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 114 students with multi-age groups. We have two classrooms with learners ages 4-6 (TK/K), two 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 and Title IV Part D funds herein accounted for. The process used to create this plan satisfies all requirements for creating a SPSA.

# Reflections: Annual Performance

A reflection on annual performance 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 level of academic challenge and the support given to students who need academic challenge. The greatest decrease was in overall satisfaction and students' emotional well-being at school.

Sherwood made great gains in CAASPP scores for both ELA and math between 2022 and 2023. Scores increased 25.1 points to 36.6 Points Below Standard for ELA and 50.6 points to 49.6 Points Below Standard for math. Our 2024 scores are not yet available. Chronic absenteeism dropped in 2022-2023 from 34.9% in 2021-2022 to 23.6% is 2022-2023 and we should see another drop for the 2023-2024 to around 12%. Our suspension rate increased from 3.4% in 2022-2023 to 5.26% in 2023-2024.

# Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

N/A Sherwood was identified for ATSI (Additional Targetd Support and Improvement) for chronic absenteeism in 2022-2023 due to a rate of 34.9% chronic absenteeism in 2021-2022, but made significant improvement (rate dropped to 23.6%) and is no longer eligible.

# 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.

N/A

## *Support for Identified Schools*

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

N/A

## *Monitoring and Evaluating Effectiveness*

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

| |
|---|
| N/A |

# Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

| Educational Partner(s) | Process for Engagement |
| --- | --- |

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Recruitment for the LCAP Focus Group was published in the school announcements dated April 18, April 23, April 25, May 2 and May 9. 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 onMay 9th had items relating to the LCAP, including invitation to join the LCAP Focus Group and planning for Student Surveys. 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 promoted in the School Announcements on April 4 and was available April 11th through May___. Invitations and reminders to complete the survey were included in the school announcements on April 11, April 18, April 23, April 25, May 2 and May 9. . A paper flier was posted at the annual Variety Show asking for participation in the survey.

On February 1, March 7, April 4 and May 2 Coffee with the Director meetings were held for parents to dialogue with the School Director. 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.

Although these promotion efforts were nearly the same as years' past, we have had a very low number of respondents for our survey so far with just 15 respondents, past years typically saw 30-40.

# Goals and Actions

## Goal

| Goal # | Description | Type of Goal |
|---|---|---|
| 1 | Provide an equitable learning environment with high quality, authentic Montessori instruction, curriculum aligned to Common Core State Standards, a broad range of traditional Montessori materials, highly-qualified teachers, and a facility in good repair.<br><br>1.1: Provide highly qualified teachers for all students.<br>1.2: Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS).<br>1.3: Provide a broad range of Montessori materials.<br>1.4: Provide a facility in good repair and maintain recess equipment.<br>1.5: Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues. | Maintenance of Progress Goal |

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 2: State Standards (Conditions of Learning)
Priority 3: Parental Involvement (Engagement)
Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

This was originally a Broad Goal to cover 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.
Good progress has been made on these and we are now classifying it as a whole as a maintenance of progress goal.

# Measuring and Reporting Results

| Metric # | Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|---|
| 1.1 | Personnel files/teachers' credentials | 100% highly qualified credentialed teachers | | | 100% highly qualified credentialed teachers | |
| 1.2 | CASSPP Scores | TBD | | | 30 points below standard for ELA 50 points below standard for math | |
| 1.3 | Montessori Materials Inventories | Most materials are in good repair, worn or broken materials will be replaced after the end of the fiscal year. | | | All classrooms will have a broad range of materials for the grade levels served. | |
| 1.4 | Facilities Inspection Tool | Repairs request system implemented and facility is being kept up. PE and recess equipment check-out system working and new materials are ordered as old wear our. | | | Facility in good repair; PE and recess equipment check-out system working and new materials are ordered as old wear out. | |
| 1.5 | Local Indicator/School Community Survey | TBD | | | 80% satisfied or very satisfied with support given struggling learners. | |

# Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

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.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

# Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **1.1** | Provide highly qualified teachers for all students. | All classrooms will have highly qualified teachers. Teachers' credentials will be reviewed each year. | $1,500.00 | No<br>Yes |
| **1.2** | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | Instruction will provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | $33,500.00 | No<br>Yes |
| **1.3** | Provide a broad range of Montessori materials. | Montessori materials are a necessary component of the Montessori classroom. | $3,000.00 | No<br>Yes |

| | | | | |
|---|---|---|---|---|
| **1.4** | Provide a facility in good repair and maintain recess equipment. | It is a basic servcie for a school to provide a facility in good repair. Input from the students indicate that they value recess equipment. | $20,000.00 | No<br>Yes |
| **1.5** | SST process | 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. | $40,000.00 | No |

# Goals and Actions

## Goal

| Goal # | Description | Type of Goal |
|---|---|---|
| 2 | Provide a positive school climate with authentic opportunities for parent involvement.<br>2.1 Ensure that parents understand the ways the school communicates with students' families.<br>2.2 Ensure that parents understand the nature of the Montessori method of education.<br>2.3 Improve parent involvement and volunteerism.<br>2.4 Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. | Maintenance of Progress Goal |

State Priorities addressed by this goal.

Priority 3: Parental Involvement (Engagement)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)

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 # | Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|---|
| 2.1 | Local metric/Parent Square | 100% of parents contactable | | | 100% of parents contactable | |
| 2.2 | Local metric/Community Survey Results | 90% of respondents agree or strongly agree that they are satisfied iwith curriculum in terms of Montessori authenticity.<br><br>81% of repondents agree or strongly agree | | | 90% of respondents will agree or strongly agree that they are satisfied iwith curriculum in terms of Montessori authenticity. | |

| | | | | | | |
|---|---|---|---|---|---|---|
| | | that they are satisfied with the opportunities to make an impact in academic outcomes for my student/s. | | | 80% of repondents will agree or strongly agree that they are satisfied with the opportunities to make an impact in academic outcomes for my student/s. | |
| 2.3 | Local metric/Parent Volunteer Tracking System | 41% of families reported volunteer huors; 2% of families met or exceeded 30 hours | | | 35% of familieswill report volunteer huors; 5% of families will meet or exceeded 30 hours . | |
| 2.4 | Chronic absenteeism Rate | 12% Chronic Absenteeism Rate | | | 10% Chronic Absenteeism Rate | |
| 2.5 | Decreased or maintained suspension rate | 5.26% Suspension Rate | | | 5% Suspension Rate | |

# Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

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.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

# Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **2.1** | Ensure that parents understand the ways the school communicates with students' families. | Office Manager and teachers will ensure that parents understand how announcements are sent home via the Parent Square Application | $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. | $30,000.00 | No |
| **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. | $5,500.00 | 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. | $15,000.00 | No |

# Goals and Actions

## Goal

| Goal # | Description | Type of Goal |
|---|---|---|
| 3 | Socioeconomically disadvantaged students will have access to free or reduced lunch, free after school tutoring, and free child care before and after school. | Equity Multiplier Focus Goal |

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 2: State Standards (Conditions of Learning)
Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

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 # | Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|---|
| 3.1 | CAASPP Scores and/or growth data | TBD | | | ELA 50 points below standard for low-income students; math 60 points below standard for low-income students and/or show at least one year's growth in ELA and math | |

| | | | | | | |
|---|---|---|---|---|---|---|
| 3.2 | CAASPP Scores and/or growth data | TBD | | | ELA 50 points below standard for low-income students; math 60 points below standard for low-income students and/or show at least one year's growth in ELA and math | |
| 3.3 | CAASPP Scores and/or growth data | TBD | | | ELA 50 points below standard for low-income students; math 60 points below standard for low-income students and/or show at least one year's growth in ELA and math | |

# Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

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.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

# 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. | $9,000.00 | |
| **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Students will have access to free tutoring after school as described in our after care program, socioeconomically disadvantaged students will not pay fees to participate. | $35,000.00 | |
| **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. | $35,000.00 | |

# Goals and Actions

## Goal

| Goal # | Description | Type of Goal |
|---|---|---|
| 4 | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Equity Multiplier Focus Goal |

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 2: State Standards (Conditions of Learning)
Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

## Measuring and Reporting Results

| Metric # | Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|---|
| 4.1 | Local mesures/Community Survey Results & Student Surveys | TBD | | | 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. | |

# Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

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.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

# Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **4.1** | Students in low-income will have access to scholarships to attend all field trips. | 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. | $6,000.00 | |

# Goals and Actions

## Goal

| Goal # | Description | Type of Goal |
|---|---|---|
| 5 | | |

State Priorities addressed by this goal.

An explanation of why the LEA has developed this goal.

## Measuring and Reporting Results

| Metric # | Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|---|

## Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

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.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable: Please refer to the 2023-24 LCAP Annual Update.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

| |
|---|
| Not Applicable: Please refer to the 2023-24 LCAP Annual Update. |

# Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2024-25]

| Total Projected LCFF Supplemental and/or Concentration Grants | Projected Additional 15 percent LCFF Concentration Grant |
|---|---|
| $114,206 | $0 |

**Required Percentage to Increase or Improve Services for the LCAP Year**

| Projected Percentage to Increase or Improve Services for the Coming School Year | LCFF Carryover — Percentage | LCFF Carryover — Dollar | Total Percentage to Increase or Improve Services for the Coming School Year |
|---|---|---|---|
| | | | |
| | 0.000% | $0.00 | |

**The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.**

## Required Descriptions

### *LEA-wide and Schoolwide Actions*

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

| Goal and Action # | Identified Need(s) | How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis | Metric(s) to Monitor Effectiveness |
|---|---|---|---|
| | | | |
| **1.1** | **Action:**<br>Provide highly qualified teachers for all students.<br><br>**Need:**<br>Students need skilled teachers for positive outcomes. | The quality of the instruction students receive directly impacts their learning experiences and academic outcomes. | Personnel files review |

| Goal and Action # | Identified Need(s) | How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis | Metric(s) to Monitor Effectiveness |
|---|---|---|---|
| | **Scope:**<br>Schoolwide | | |
| **1.2** | **Action:**<br>Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS).<br><br>**Need:**<br>A Montessori education, as chosen by students' parents and guardians, that addresses Common Core State Standards.<br><br>**Scope:**<br>LEA-wide | All students require an effective curriculum that increases students' understanding about the world around them and provides them with knowledge and skills necessary for success in the 21st century. | CAASPP scores |
| **1.3** | **Action:**<br>Provide a broad range of Montessori materials.<br><br>**Need:**<br>All public school students must be provided with equal access to instructional materials.<br><br>**Scope:**<br>Schoolwide | All students will have access to the materials that are an essential part of a Montessori education. | Materials inventory |
| **1.4** | **Action:**<br>Provide a facility in good repair and maintain recess equipment.<br><br>**Need:**<br>All public school students must be provided with safe and decent school facilities. Recess equipment is an important part of the school | Providing facilities that are safe are necessary for all students for learning. Being able to play at recess is also necessary for all students. | Facilities Inspection Tool |

| Goal and Action # | Identified Need(s) | How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis | Metric(s) to Monitor Effectiveness |
|---|---|---|---|
| | environment, as expressed by Sherwood students in the Student Survey.<br><br>**Scope:**<br>Schoolwide | | |

## *Limited Actions*

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

| Goal and Action # | Identified Need(s) | How the Action(s) are Designed to Address Need(s) | Metric(s) to Monitor Effectiveness |
|---|---|---|---|
| | | | |

For any limited 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, as applicable.

| |
|---|
| |

## *Additional Concentration Grant Funding*

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 | 1:3 | |

| 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 certificated staff providing direct services to students | 1:15 | |

# 2024-25 Total Expenditures Table

| LCAP Year | 1. Projected LCFF Base Grant (Input Dollar Amount) | 2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount) | 3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1) | LCFF Carryover — Percentage (Input Percentage from Prior Year) | Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %) |
|---|---|---|---|---|---|
| | [INPUT] | [INPUT] | [AUTO-CALCULATED] | [AUTO-CALCULATED] | [AUTO-CALCULATED] |
| Totals | | 114,206 | | 0.000% | |

| Totals | LCFF Funds | Other State Funds | Local Funds | Federal Funds | Total Funds | Total Personnel | Total Non-personnel |
|---|---|---|---|---|---|---|---|
| | [AUTO-CALCULATED] | [AUTO-CALCULATED] | [AUTO-CALCULATED] | [AUTO-CALCULATED] | [AUTO-CALCULATED] | [AUTO-CALCULATED] | [AUTO-CALCULATED] |
| Totals | $193,500.00 | $11,000.00 | $10,000.00 | $25,000.00 | $239,500.00 | $119,975.00 | $119,525.00 |

| Goal # | Action # | Action Title | Student Group(s) | Contributing to Increased or Improved Services? | Scope | Unduplicated Student Group(s) | Location | Time Span | Total Personnel | Total Non-personnel | LCFF Funds | Other State Funds | Local Funds | Federal Funds | Total Funds |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| This table was automatically populated from this LCAP. | | | | | | | | | | | | | | | |
| 1 | 1.1 | Provide highly qualified teachers for all students. | All | No<br>Yes | Scholwide | | | Week's time in August | $1,500.00 | $0.00 | $1,500.00 | | | | $1,500.00 |
| 1 | 1.2 | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | All | No<br>Yes | LEA-wide | | | All school year | $0.00 | $33,500.00 | $33,500.00 | | | | $33,500.00 |
| 1 | 1.3 | Provide a broad range of Montessori materials. | All | No<br>Yes | Scholwide | | | First three months of school | $0.00 | $3,000.00 | $3,000.00 | | | | $3,000.00 |
| 1 | 1.4 | Provide a facility in good repair and maintain recess equipment. | All | No<br>Yes | Scholwide | | | Ongoing | $0.00 | $20,000.00 | $10,000.00 | | $10,000.00 | | $20,000.00 |
| 1 | 1.5 | SST process | All Students with Disabilities | No | | | | Ongoing throughout the school year. | $0.00 | $40,000.00 | $10,000.00 | $5,000.00 | | $25,000.00 | $40,000.00 |
| 2 | 2.1 | Ensure that parents understand the ways the school communicates with students' families. | All | No | | | | By October conferences and ongoing as new families enroll | $2,975.00 | $3,025.00 | $6,000.00 | | | | $6,000.00 |
| 2 | 2.2 | Ensure that parents understand the nature of the Montessori method of education. | All | No | | | | Throughout the year at various school functions, including | $25,000.00 | $5,000.00 | $30,000.00 | | | | $30,000.00 |

| Goal # | Action # | Action Title | Student Group(s) | Contributing to Increased or Improved Services? | Scope | Unduplicated Student Group(s) | Location | Time Span | Total Personnel | Total Non-personnel | LCFF Funds | Other State Funds | Local Funds | Federal Funds | Total Funds |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | Back to School Night, Parent Education Events, conferences, Open House, and school tours | | | | | | | |
| **2** | **2.3** | Improve parent involvement and volunteerism. | All | No | | | | Volunteer opportunitites are available all school year long. | $5,500.00 | $0.00 | $5,500.00 | | | | $5,500.00 |
| **2** | **2.4** | Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. | All | No | | | | Ongoing throughout the year, attendance meetings at least once every two weeks | $15,000.00 | $0.00 | $15,000.00 | | | | $15,000.00 |
| **3** | **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks. | Low Income | | | Low Income | | Each school day throughout the year. | $9,000.00 | $0.00 | $9,000.00 | | | | $9,000.00 |
| **3** | **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Low Income | | | Low Income | | Each school day throughout the year. | $30,000.00 | $5,000.00 | $35,000.00 | | | | $35,000.00 |
| **3** | **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school. | Low Income | | | Low Income | | Each day of school throughout the year. | $30,000.00 | $5,000.00 | $35,000.00 | | | | $35,000.00 |
| **4** | **4.1** | Students in low-income will have access to scholarships to attend all field trips. | Low Income | | | Low Income | | Throughout the year | $1,000.00 | $5,000.00 | | $6,000.00 | | | $6,000.00 |

# 2024-25 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 |
|---|---|---|---|---|---|---|---|---|---|
| [INPUT] | [INPUT] | [AUTO-CALCULATED] | [AUTO-CALCULATED] | [AUTO-CALCULATED] | [AUTO-CALCULATED] | [AUTO-CALCULATED] | [AUTO-CALCULATED] | | [AUTO-CALCULATED] |
| | 114,206 | | 0.000% | | $48,000.00 | 0.000% | 0.000 % | **Total:** | $48,000.00 |
| | | | | | | | | **LEA-wide Total:** | $33,500.00 |
| | | | | | | | | **Limited Total:** | $0.00 |
| | | | | | | | | **Schoolwide Total:** | $14,500.00 |

| 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 (%) |
|---|---|---|---|---|---|---|---|---|
| This table is automatically generated and calculated from this LCAP. | | | | | | | | |
| **1** | **1.1** | Provide highly qualified teachers for all students. | Yes | Schoolwide | | | $1,500.00 | |
| **1** | **1.2** | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | Yes | LEA-wide | | | $33,500.00 | |
| **1** | **1.3** | Provide a broad range of Montessori materials. | Yes | Schoolwide | | | $3,000.00 | |
| **1** | **1.4** | Provide a facility in good repair and maintain recess equipment. | Yes | Schoolwide | | | $10,000.00 | |
| **3** | **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks. | | | Low Income | | $9,000.00 | |

| 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 | 3.2 | Socioeconomically disadvantaged students will have access to free after school tutoring. | | | Low Income | | $35,000.00 | |
| 3 | 3.3 | Socioeconomically disadvantaged students will have access to free child care before and after school. | | | Low Income | | $35,000.00 | |
| 4 | 4.1 | Students in low-income will have access to scholarships to attend all field trips. | | | Low Income | | | |

# 2023-24 Annual Update Table

| Totals | Last Year's Total Planned Expenditures (Total Funds) | Total Estimated Expenditures (Total Funds) |
|---|---|---|
| | [AUTO-CALCULATED] | [AUTO-CALCULATED] |
| **Totals** | $277,719.00 | $0.00 |

| Last Year's Goal # | Last Year's Action # | Prior Action/Service Title | Contributed to Increased or Improved Services? | Last Year's Planned Expenditures (Total Funds) | Estimated Actual Expenditures (Input Total Funds) |
|---|---|---|---|---|---|
| This table was automatically populated from the 2023 LCAP. Existing content should not be changed, but additional actions/funding can be added. | | | | | |
| **1** | **1.1** | Provide highly qualified teachers for all students. | No | $1,575.00 | |
| **1** | **1.2** | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | No | $33,382.00 | |
| **1** | **1.3** | Provide a broad range of Montessori materials. | No | $3,009.00 | |
| **1** | **1.4** | Provide a facility in good repair and maintain recess equipment. | No | $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. | No | $11,119.00 | |
| **2** | **2.1** | Ensure that parents understand the ways the school communicates with students' families. | No | $6,000.00 | |
| **2** | **2.2** | Ensure that parents understand the nature of the Montessori method of education. | No | $31,259.00 | |
| **2** | **2.3** | Improve parent involvement and volunteerism. | No | $5,038.00 | |

| Last Year's Goal # | Last Year's Action # | Prior Action/Service Title | Contributed to Increased or Improved Services? | Last Year's Planned Expenditures (Total Funds) | Estimated Actual Expenditures (Input Total Funds) |
|---|---|---|---|---|---|
| **2** | **2.4** | Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. | No | $15,384.00 | |
| **3** | **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks. | Yes | $8,713.00 | |
| **3** | **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Yes | $69,050.00 | |
| **3** | **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school. | Yes | $69,050.00 | |
| **4** | **4.1** | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Yes | $4,552.00 | |

# 2023-24 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) |
|---|---|---|---|---|---|---|
| | | | | | | |
| | $7,152.00 | $0.00 | $0.00 | 17.870% | 0.000% | -17.870% |

| 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) |
|---|---|---|---|---|---|---|---|
| This table was automatically populated from the 2022 LCAP. Existing content should not be changed, but additional actions/funding can be added. | | | | | | | |
| **3** | **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks. | Yes | $2,600.00 | | 3% | |
| **3** | **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Yes | | | 3% | |
| **3** | **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school. | Yes | | | 8% | |
| **4** | **4.1** | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Yes | $4,552.00 | | 3.87% | |

# 2023-24 LCFF Carryover Table

| 9. Estimated Actual LCFF Base Grant (Input Dollar Amount) | 6. Estimated Actual LCFF Supplemental and/or Concentration Grants | LCFF Carryover — Percentage (Percentage from Prior Year) | 10. Total Percentage to Increase or Improve Services for the Current School Year (6 divided by 9 + Carryover %) | 7. Total Estimated Actual Expenditures for Contributing Actions (LCFF Funds) | 8. Total Estimated Actual Percentage of Improved Services (%) | 11. Estimated Actual Percentage of Increased or Improved Services (7 divided by 9, plus 8) | 12. LCFF Carryover — Dollar Amount (Subtract 11 from 10 and multiply by 9) | 13. LCFF Carryover — Percentage (12 divided by 9) |
|---|---|---|---|---|---|---|---|---|
| | | | 0.000% | $0.00 | 0.000% | 0.000% | $0.00 | 0.000% |

# Local Control and Accountability Plan 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, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (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 the nature of some LCAP template sections 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, including long-term 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]).

        - **NOTE:** As specified in *EC* Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to *EC* Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, *EC*

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (*EC* sections 52064[b][6], [8], and [11]).

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 must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (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 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023.

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 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 which, based on research, experience, and input gathered from educational partners, the LEA believes 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 document. Additionally, the beginning of each template section includes information emphasizing the purpose that 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 present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

## Requirements and Instructions

**General Information**

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

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, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

**Reflections: Annual Performance**

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

**Reflections: Technical Assistance**

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as "Not Applicable."

**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

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

- Identify the schools within the LEA that have been identified for CSI.

### Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

- 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

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

- 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, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, 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 to 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.

## Requirements

**School districts and COEs:** *EC* sections 52060(g) (California Legislative Information) and 52066(g) (California Legislative Information) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. 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.

**Charter schools:** *EC* Section 47606.5(d) (California Legislative Information) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

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. 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 CDE's LCAP webpage.

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see Education Code Section 52062 (California Legislative Information);
    - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).

- For COEs, see Education Code Section 52068 (California Legislative Information); and
- For charter schools, see Education Code Section 47606.5 (California Legislative Information).
- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

# Instructions

**Respond to the prompts as follows:**

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

**Complete the table as follows:**

Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it 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.
- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- 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. 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.

- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.

- For the purposes of this prompt, this may also include, but is 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 target 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 students
    - Analysis of effectiveness of the specific actions to achieve the goal
    - Analysis of material differences in expenditures
    - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
    - Analysis 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 must 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 must 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. As previously stated, 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, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

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.
    - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- 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.

**Requirement to Address the LCFF State Priorities**

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The LCFF State Priorities Summary provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

**Focus Goal(s)**

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.

Type of Goal

Identify the type of goal being implemented as a Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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.

**Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding**

Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

(A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and

(B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.

- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
    - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
    - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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.
- In addition to this information, the LEA must also identify:
    - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

**Note:** *EC* Section 42238.024(b)(1) (California Legislative Information) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

**Broad 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.

Type of Goal

Identify the type of goal being implemented as a Broad Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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**

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.

Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain how the actions will sustain the progress exemplified by the related metrics.

**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 must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.
- 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 local indicator self-reflection tools within the Dashboard.

- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
    - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.
- **Required metrics for Equity Multiplier goals**: For each Equity Multiplier goal, the LEA must identify:
    - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or
    - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.

Complete the table as follows:

### Metric #

- Enter the metric number.

### Metric

- Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.

### Baseline

- Enter the baseline when completing the LCAP for 2024–25.
    - Use the most recent data associated with the 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 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (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.
    - Indicate the school year to which the baseline data applies.
    - The baseline data must remain unchanged throughout the three-year LCAP.
        - This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain

accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.

- If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.

- Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

## Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
    - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

## Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.
    - Note for Charter Schools: Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

## Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

## Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

Timeline for school districts and COEs for completing the "**Measuring and Reporting Results**" part of the Goal.

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|
| Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric. | Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric. | Enter information in this box when completing the LCAP for **2025–26**. Leave blank until then. | Enter information in this box when completing the LCAP for **2026–27**. Leave blank until then. | Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric. | Enter information in this box when completing the LCAP for **2025–26** and **2026–27**. Leave blank until then. |

**Goal Analysis:**

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. "Effective" means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

**Note:** When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as "Not Applicable."

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
    - Include a discussion of relevant challenges and successes experienced with the implementation process.
    - This discussion 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.

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.

- 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.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
    - 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.
    - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

- 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.
    - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:
        - The reasons for the ineffectiveness, and
        - How changes to the action will result in a new or strengthened approach.

**Actions:**
Complete the table as follows. Add additional rows as necessary.

Action #

- Enter the action number.

Title

- Provide a short title for the action. This title will also appear in the action tables.

Description

- Provide a brief description of the action.

- For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

- As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.

- These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

## Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

## Contributing

- Indicate whether the action contributes to meeting the increased 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 contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 *CCR*] Section 15496 in the Increased or Improved Services section of the LCAP.

***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.

**Required Actions**

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:

    - Language acquisition programs, as defined in *EC* Section 306, provided to students, and

    - Professional development for teachers.

    - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.

- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
    - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
    - These required actions will be effective for the three-year LCAP cycle.

# 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 as defined in *EC* Section 42238.02 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.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

**Statutory Requirements**
An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC* Section 52064[b][8][B]; 5 *CCR* Section 15496[a]). This proportionality percentage is also known as the "minimum proportionality percentage" or "MPP." The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

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 identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

**LEA-wide and Schoolwide Actions**
In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all 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 increased or improved services standard because enrolling students is not the same as serving students.

**For School Districts Only**
Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

# Requirements and Instructions

Complete the tables as follows:

### Total 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 foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

### Projected Additional 15 percent LCFF Concentration Grant

- 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 LEA's 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:

**LEA-wide and Schoolwide Actions**

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

**Identified Need(s)**

Provide an explanation of the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

**How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis**

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, 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 increased or improved services standard because enrolling students is not the same as serving students.

**Metric(s) to Monitor Effectiveness**

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

**Note for COEs and Charter Schools**: In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

**Limited Actions**

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

**Identified Need(s)**

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

**How the Action(s) are Designed to Address Need(s)**

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

**Metric(s) to Monitor Effectiveness**

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited 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, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.

- 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, based on the LEA's current pay scale, 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 Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

**Additional Concentration Grant Funding**

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 a single-school LEA or 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 Total Planned Expenditures 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 Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover 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 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

# Total Planned Expenditures Table

In the Total Planned Expenditures 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 estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 *CCR* Section 15496(a)(8).

Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated 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 requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.

- 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.

  - **Note:** Equity Multiplier funds must be included in the "Other State Funds" category, not in the "LCFF Funds" category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA's LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

- **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, based on the LEA's current pay scale, 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 Services 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 estimated based on 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 estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 *CCR* Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **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 plus 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
November 2023

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Calendar Revision**

**Date:** May 16, 2024

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**SUMMARY**

A revision to the 2024-2025 calendar is needed to stay aligned with Chico Unified's calendar.

**DISCUSSION**

In January, CUSD made changes to its adopted calendar. We find it helpful to be aligned to CUSD's calendar for families to have congruent vacation times.

**ACTION REQUESTED:**

Approve calenar.

Attachment: 2024-2025 Calendar, revised

# Sherwood Montessori

## 2024-2025 School Calendar

### July 2024

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | | | |

### August 2024

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

### September 2024

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | | | | | |

### October 2024

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | 31 | | |

### November 2024

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | | 1 | 2 |
| 3 | 4 | 5 | 6 | 7 | 8 | 9 |
| 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| 17 | 18 | 19 | 20 | 21 | 22 | 23 |
| 24 | 25 | 26 | 27 | 28 | 29 | 30 |

### December 2024

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | | | | |

### January 2025

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | |

### February 2025

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | |

### March 2025

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 31 | | | | | |

### April 2025

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | 1 | 2 | 3 | 4 | 5 |
| 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 29 | 30 | | | |

### May 2025

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| | | | | 1 | 2 | 3 |
| 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

### June 2025

| Su | M | Tu | W | Th | F | Sa |
|---|---|---|---|---|---|---|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | | | | | |

School Closed
Early Release Day/Parent Teacher Conferences
Employee Planning (no school for students)
Report Cards
First and Last Day of School

| | |
|---|---|
| Aug 14-16 | Planning/Development Days |
| Aug 20 | First Day of School for students |
| Sep 2 | Labor Day-Closed |
| Oct 14-18 | Parent/Teacher conferences Dismissal 1:35 p.m. |
| Nov 11 | Veterans Day-Closed |
| Nov 25-29 | Thanksgiving Break |
| Dec 20 | Report Cards |
| Dec 23-Jan 6 | Winter Break |

| | |
|---|---|
| Jan 20 | Dr. Martin Luther King Jr Day-Closed |
| Feb 14 | Lincoln's Birthday-Closed |
| Feb 17 | Presidents' Day-Closed |
| Mar 17-21 | Spring Break |
| Apr 7-11 | Parent/Teacher conferences Dismissal 1:35 p.m. |
| Apr 18-21 | Spring Travel Days |
| May 26 | Memorial Day-Closed |
| Jun 6 | Last Day of School/ Report Cards |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **LCAP Federal Addendum**

**Date:** May 16, 2024

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**SUMMARY**

Sherwood needs to submit a board approved LCAP Federal Addendum to be eligible to receive federal funds through Title I Part A and Title IV Part A.

**DISCUSSION**

A board approved LCAP Federal Addendum submitted on the official template is required to be eligible to receive federal funds. The Consolidated Application and associated certifications for assurances will also be submitted to receive the funds. In total, the school will receive about $35,000 with $10,000 coming from Title IV Part A.

**ACTION REQUESTED:**

Approve LCAP Federal Addendum.

Attachment: LCAP Federal Addendum

# Local Control and Accountability Plan (LCAP)
# Every Student Succeeds Act (ESSA)
# Federal Addendum Template

## School Year
2024-2025

## Date of Board Approval

## LEA Name
Sherwood Montessori

## CDS Code:
04614240121475

## Link to the LCAP:
***(optional)***

## For which ESSA programs apply to your LEA?

Choose From:

**TITLE I, PART A**
Improving Basic Programs Operated by State and Local Educational Agencies

**TITLE IV, PART A**
Student Support and Academic Enrichment Grants

*(**note:** This list only includes ESSA programs with LEA plan requirements; not all ESSA programs.)*

*In the following pages, ONLY complete the sections for the corresponding programs.*

## Instructions

The LCAP Federal Addendum is meant to supplement the LCAP to ensure that eligible LEAs have the opportunity to meet the Local Educational Agency (LEA) Plan provisions of the ESSA.

The LCAP Federal Addendum Template must be completed and submitted to the California Department of Education (CDE) to apply for ESSA funding**.** LEAs are encouraged to review the LCAP Federal Addendum annually with their LCAP, as ESSA funding should be considered in yearly strategic planning.

**The LEA must address the Strategy and Alignment prompts provided on the following page.**

**Each provision for each program must be addressed** unless the provision is not applicable to the LEA.

In addressing these provisions, LEAs must provide a narrative that addresses the provision **within the LCAP Federal Addendum Template.**

Under State Priority Alignment, state priority numbers are provided to demonstrate where an ESSA provision aligns with state priorities. This is meant to assist LEAs in determining where ESSA provisions may already be addressed in the LEA's LCAP, as it demonstrates the LEA's efforts to support the state priorities.

The CDE emphasizes that **the LCAP Federal Addendum should not drive LCAP development.** ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP development as much as possible to promote strategic planning of all resources**; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

This template is designed to be used by LEAs who already have completed their LCAP Federal Addendum and received approval from CDE. This template will support LEAs with the review of their LCAP Federal Addendum and revision.

The review and revision of the LCAP Federal Addendum do not need to be submitted to CDE for approval. However, an LEA should have their local Board approve any revisions.

**Even if the LEA plans to transfer all of its title funds, it must still address all of the provisions of the title from which it is transferring its funds. The LEA must first meet the application requirements of those funds before it can elect to transfer those funds to another title.**

California's ESSA State Plan significantly shifts the state's approach to the utilization of federal resources in support of underserved student groups. This LCAP Federal Addendum provides LEAs with the opportunity to document their approach to maximizing the impact of federal investments in support of underserved students.

The implementation of ESSA in California presents an opportunity for LEAs to innovate with their federally-funded programs and align them with the priority goals they are realizing under the state's Local Control Funding Formula (LCFF).

LCFF provides LEAs flexibility to design programs and provide services that meet the needs of students in order to achieve readiness for college, career, and lifelong learning. The LCAP planning process supports continuous cycles of action, reflection, and improvement.

Please respond to the prompts below, and in the pages that follow, to describe the LEA's plan for making the best use of federal ESEA resources in alignment with other federal, state, and local programs as described in the LEA's LCAP.

## Strategy

Explain the LEA's strategy for using federal funds to supplement and enhance local priorities or initiatives funded with state funds, as reflected in the LEA's LCAP. This shall include describing the rationale/evidence for the selected use(s) of federal funds within the context of the LEA's broader strategy reflected in the LCAP.

Sherwood Montessori is a TK-8 charter school in Chico, California serving approximately 114 students and their families in the 2023-2024 school year delivering a public education with the Montessori method. Sherwood's population includes students who are socioeconomically disadvantaged, students experiencing homelessness, English learners, and foster youth.
The major goals of Sherwood's LCAP include: 1) Provide high quality, authentic Montessori instruction with curriculum aligned to Common Core State Standards, a broad range of traditional Montessori materials, highly-qualified teachers, and a facility in good repair. 2) Provide a positive school climate with authentic opportunities for parent involvement.
The actions taken to meet the goals include:
1) Provide highly qualified teachers for all students.
2) Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS).
3) Provide a broad range of Montessori materials.
4) Provide a facility in good repair and maintain recess equipment.
5) Provide 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.
6) Ensure that parents understand the ways the school communicates with students' families.
7) Ensure that parents understand the nature of the Montessori method of education.
8) Improve parent involvement and volunteerism.
9) Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates.
The increased or improved services for socioeconomically disadvantaged students, foster youth and English Learners are to provide access to free and reduced lunch and access to scholarships for field trips.

These goals and actions were chosen through a process of collecting a variety of data points and determining, with stakeholder input, how to use resources to address needs shown in the data. Metrics used to determine needs included: parent, family, and community surveys and dialogue in meetings, staff surveys and dialogue at meetings, student surveys, attendance data, discipline data, curriculum based formative assessments, standardized test data, facilities inspection tools, materials inventories, and review of personnel files. Data points are collected and analyzed by a focus group with members who have included the school director, teachers, parents, and board members. Drafts of the plan are brought to public meetings for the wider community to respond to before the plan is finalized.

## Alignment

Describe the efforts that the LEA will take to align use of federal funds with activities funded by state and local funds and, as applicable, across different federal grant programs.

Sherwood has evaluated progress over the past three years and found that goals have been met, or exceeded, or significant progress has been made. Therefore, goals and actions will maintained and supported with revenues from the following funding sources: Base funding, Supplemental Grant, Titles I & IV, SUMS MTSS Grant, Microsoft Settlement Technology Grant,and  state and federal SELPA funds.
Goals and actions used in the 2023-2024 LCAP Local Control Accountability Plan can be found in this plan.

## ESSA Provisions Addressed Within the LCAP

Within the LCAP an LEA is required to describe its goals and the specific actions to achieve those goals, for each of the LCFF state priorities. In an approvable LCAP, it will be apparent from the descriptions of the goals, actions, and services how an LEA is acting to address the following ESSA provisions through the aligned LCFF state priorities and/or the state accountability system.

## TITLE I, PART A

### Monitoring Student Progress Towards Meeting Challenging State Academic Standards

| ESSA SECTION | STATE PRIORITY ALIGNMENT |
|---|---|
| 1112(b)(1) (A–D) | 1, 2, 4, 7, 8 *(as applicable)* |

Describe how the LEA will monitor students' progress in meeting the challenging state academic standards by:

(A) developing and implementing a well-rounded program of instruction to meet the academic needs of all students;
(B) identifying students who may be at risk for academic failure;
(C) providing additional educational assistance to individual students the LEA or school determines need help in meeting the challenging State academic standards; and
(D) identifying and implementing instructional and other strategies intended to strengthen academic programs and improve school conditions for student learning.

### Overuse in Discipline Practices that Remove Students from the Classroom

| ESSA SECTION | STATE PRIORITY ALIGNMENT |
|---|---|
| 1112(b)(11) | 6 *(as applicable)* |

Describe how the LEA will support efforts to reduce the overuse of discipline practices that remove students from the classroom, which may include identifying and supporting schools with high rates of discipline, disaggregated by each of the student groups, as defined in Section 1111(c)(2).

### Career Technical and Work-based Opportunities

| ESSA SECTION | STATE PRIORITY ALIGNMENT |
|---|---|
| 1112(b)(12)(A–B) | 2, 4, 7 *(as applicable)* |

If determined appropriate by the LEA, describe how such agency will support programs that coordinate and integrate:

(A) academic and career and technical education content through coordinated instructional strategies, that may incorporate experiential learning opportunities and promote skills attainment important to in-demand occupations or industries in the State; and
(B) work-based learning opportunities that provide students in-depth interaction with industry professionals and, if appropriate, academic credit.

## TITLE II, PART A

### Title II, Part A Activities

| ESSA SECTION | STATE PRIORITY ALIGNMENT |
|---|---|
| 2102(b)(2)(A) | 1, 2, 4 *(as applicable)* |

Provide a description of the activities to be carried out by the LEA under this Section and how these activities will be aligned with challenging State academic standards.

## TITLE III, PART A

### Parent, Family, and Community Engagement

| ESSA SECTION | STATE PRIORITY ALIGNMENT |
|---|---|
| 3116(b)(3) | 3, 6 *(as applicable)* |

Describe how the eligible entity will promote parent, family, and community engagement in the education of English learners.

## ESSA Provisions Addressed in the Consolidated Application and Reporting System

An LEA addresses the following ESSA provision as part of completing annual reporting through the Consolidated Application and Reporting System (CARS).

## TITLE I, PART A

### Poverty Criteria

| ESSA SECTION(S) | STATE PRIORITY ALIGNMENT |
|---|---|
| 1112(b)(4) | N/A |

Describe the poverty criteria that will be used to select school attendance areas under Section 1113.

Direct certification, or qualifying for free or reduced meals.

## ESSA Provisions Not Addressed in the LCAP

For the majority of LEAs, the ESSA provisions on the following pages do not align with state priorities. **Each provision for each program provided on the following pages must be addressed** unless the provision is not applicable to the LEA. In addressing these provisions, LEAs must provide a narrative that addresses the provision **within this addendum**.

As previously stated, the CDE emphasizes that the LCAP Federal Addendum should not drive LCAP development. ESSA funds are supplemental to state funds, just as the LCAP Federal Addendum supplements your LCAP. **LEAs are encouraged to integrate their ESSA funds into their LCAP** development as much as possible to promote strategic planning of all resources; however, this is not a requirement. In reviewing the LCAP Federal Addendum, staff will evaluate the LEA's responses to the ESSA plan provisions. There is no standard length for the responses. LEAs will be asked to clarify insufficient responses during the review process.

## TITLE I, PART A

### Educator Equity

ESSA SECTION 1112(b)(2) – *Not Applicable to Charters and Single School Districts.*

Describe how the LEA will identify and address, as required under State plans as described in Section 1111(g)(1)(B), any disparities that result in low-income students and minority students being taught at higher rates than other students by ineffective, inexperienced, or out-of-field teachers.

NOTE: In this section, LEAs must identify and address disparities. Tools on the CDEs website (https://www.cde.ca.gov/pd/ee/peat.asp) can help with this process. LEAs are required to specifically address the following at comparable sites:

1. What # and % of teachers at sites are inexperienced, misassigned, or out-of-field in relation to:
    a. Number of low-income students
    b. Number of minority students
2. Does the LEA have an educator equity gap –
    a. If yes, must create a plan which must include root cause analysis of the disparity
    b. A plan must be created with meaningful educational partner engagement.

Educator Equity Data Tables available here.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

Sherwood is a single-site charter school with traditional Montessori multiple-age groupings. Our LCAP includes Goal1 (addressing the State Priority 1: Basic Conditions of Learning): Provide high quality, authentic Montessori instruction with curriculum aligned to Common Core State Standards, a broad range of traditional Montessori materials, highly-qualified teachers, and a facility in good repair.
Goal 1.1: Provide highly qualified teachers for all students includes the Action: Continue to monitor teacher credentials and assignments, with the measurable outcome: Maintain 100% highly qualified credentialed teachers. Funds are allocated to this action to cover the costs of salary and benefit of personnel assigned to audit employee files for compliance.

On November 6, 2019, the SBE approved updated definitions for "ineffective" and "out-of-field" teachers to be included in the amended California ESSA Consolidated State Plan.

| Term | Definition |
|---|---|
| Ineffective teacher | An ineffective teacher is any of the following: |

| | |
|---|---|
| | • An individual whose assignment is legally authorized by an emergency permit that does not require possession of a full teaching license; or<br>• A teacher who holds a teaching credential but does not possess a permit or authorization that temporarily allows them to teach outside of their credentialed area (misassigned)<br>• An individual who holds no credential, permit, or authorization to teach in California.<br><br>Under this definition, teachers with the following limited emergency permits would be considered ineffective:<br><br>• **Provisional Internship Permits,**<br>• **Short-Term Staff Permits**<br>• **Variable Term Waivers**<br><br>**Substitute permits or Teaching Permits for Statutory Leave (TSPL) holders serving as the teacher of record** |
| Out-of-field teacher | A credentialed out-of-field teacher is: A credentialed teacher who has not yet demonstrated subject matter competence in the subject area(s) or for the student population to which he or she is assigned. Under this definition, the following limited permits will be considered out of the field:<br><br>• General Education Limited Assignment Permit (GELAP)<br>• Special Education Limited Assignment Permit (SELAP)<br>• **Short-Term Waivers**<br>• **Emergency English Learner or Bilingual Authorization Permits**<br><br>**Local Assignment Options** (except for those made pursuant to the *California Code of Regulations*, Title 5, Section 80005[b]) |
| Inexperienced Teacher | A teacher who has two or fewer years of teaching experience. |
| Minority Student | A student who is American Indian/Alaska Native, Asian, African American, Filipino, Native Hawaiian/Pacific Islander, Hispanic, or Two or More Races Not Hispanic. |
| Low-Income Student | A student who is eligible to receive Free or Reduced-Price Meals |

## Parent and Family Engagement

ESSA SECTIONS 1112(b)(3) and 1112(b)(7)

Describe the strategy the LEA will use to implement effective parent and family engagement under Section 1116.

Sherwood Montessori develops and evaluates the Title 1 Parent Engagement Policy through the Sherwood Montessori Parent Organization (SMPO). The SMPO includes all parents and teachers and has leadership volunteered by its members. The SMPO meetsto plan and support parent education and involvement.
Froom our LCAP, the relevant goal is Goal 2: Provide a positive school climate with authentic opportunities for parent involvement.
Subgoals include:
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.

Actions to achieve these goals include:
1. Office staff will review enrollment to ensure that each family has updated contact information. Teachers will assess parents' understanding of communication procedures at conferences. The school will continue to implement a text to cell phone or email (according to parent preference) system of sending reminders and announcements.
2. The value of parent education opportunities will be communicated to the parent community. Childcare and refreshments will be provided. Relevant curriculum materials will be provided to parents who attend.
3. A volunteering tracking system has been developed and will continue to be used to encourage parents, guardians, family members and community members to volunteer for the school.
4. The office staff, school director, and wellness counseling interns will collaborate to hold conferences with parents of chronically absent students and implement SST process as appropriate for any students with suspensions.
5. The attendance campaign that was launched as a component of PBIS implementation will be brought back to its pre-pandemic level.

To meet this requirement, LEAs must provide a description of the following:

**ESSA Section 1112(b)(3)**: how the LEA will carry out its responsibilities under paragraphs (1) and (2) of Section 1111(d);

1. How the LEA will involve parents and family members at identified schools in jointly developing Comprehensive Support and Improvement plans
2. How the LEA will involve parents and family members in identified schools in jointly developing the Targeted Support and Improvement plans
3. In the absence of the identification of any schools for Comprehensive Support and Improvement (CSI) or any schools for Targeted Assistance and Intervention (TSI), the LEA may write N/A. This provision will not be reviewed.

**ESSA Section 1112(b)(7)**: the strategy the LEA will use to implement effective parent and family engagement under Section 1116; shall include how the LEA and its schools will build capacity for parent and family engagement by:

1. Describe the LEA parent and family engagement policy, and how it was developed jointly with, agree on with, and distribute to, parents and family members of participating children a written parent and family engagement policy (ESSA Section 1116(a)).
2. Describe how the LEA will provide assistance to parents of children served by the school or local educational agency, as appropriate, in understanding such topics as the challenging State academic standards, State and local academic assessments, the requirements of this part, and how to monitor a child's progress and work with educators to improve the achievement of their children; (ESSA Section 1116(e)(1))
3. Describe how the LEA will provide materials and training to help parents to work with their children to improve their children's achievement, such as literacy training and using technology (including education about the harms of copyright piracy), as appropriate, to foster parental involvement; (ESSA Section 1116(e)(2))
4. Describe how the LEA will educate teachers, specialized instructional support personnel, principals, other school leaders, and other staff, with the assistance of parents, in the value and utility of contributions of parents, and in how to reach out to, communicate with, and work with parents as equal partners, implement and coordinate parent programs, and build ties between parents and the school; (ESSA Section 1116(e)(3))
5. Describe how the LEA will to the extent feasible and appropriate, coordinate and integrate parent involvement programs and activities with other Federal, State, and local programs, including public preschool programs, and conduct other activities, such as parent resource centers, that encourage and support parents in more fully participating in the education of their children; (ESSA Section 1116(e)(4))

6. Describe how the LEA will ensure that information related to school and parent programs, meetings, and other activities is sent to the parents of participating children in a format and, to the extent practicable, in a language the parents can understand (ESSA Section 1116(e)(5))
7. Describe how the LEA will provide such other reasonable support for parental involvement activities as parents may request (ESSA Section 1116(e)(14).
8. Describe how the LEA will provide opportunities for the informed participation of parents and family members (including parents and family members who have limited English proficiency, parents and family members with disabilities, and parents and family members of migratory children), including providing information and school reports in a format and, to the extent practicable, in a language, such parents understand (ESSA Section 1116(f)).

Also, include how the LEA will align parent involvement required in Section 1116 with the LCAP educational partner engagement process.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

Sherwood Montessori develops and evaluates the Title 1 Parent Engagement Policy through the Sherwood Montessori Parent Organization (SMPO). The SMPO includes all parents and teachers and has leadership elected by its members. The SMPO meets monthly and is the planning and support organization to facilitate parent education and involvement. From our LCAP, the relevant goal is Goal 2: Provide a positive school climate with authentic opportunities for parent involvement.
Subgoals include:
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.

Actions to achieve these goals include:
1. Office staff will review enrollment to ensure that each family has updated contact information. Teachers will assess parents' understanding of communication procedures at conferences. The school will continue to implement a text to cell phone or email (according to parent preference) system of sending reminders and announcements.
2. The value of parent education opportunities will be communicated to the parent community. Childcare and refreshments will be provided. Relevant curriculum materials will be provided to parents who attend.
3. The school director will meet with the parent group leaders to continue to refine the parent volunteer opportunities communication & tracking system. A simplified system will be put in place and incorporated with the parent communication system (Parent Square).
4. The office staff, school director, and social work interns will collaborate to hold conferences with parents of chronically absent students. The SST process will be implemented as appropriate for any students with suspensions.
5. The attendance campaign that was launched as a component of PBIS implementation will be reinforced with more celebrations for students who maintain positive behavior and good attendance.

## Schoolwide Programs, Targeted Support Programs, and Programs for Neglected or Delinquent Children

ESSA SECTIONS 1112(b)(5) and 1112(b)(9)

Describe, in general, the nature of the programs to be conducted by the LEA's schools under sections 1114 and 1115 and, where appropriate, educational services outside such schools for children living in local institutions for neglected or delinquent children, and for neglected and delinquent children in community day school programs.

Currently, there are no Sherwood students living in institutions or attending community day school programs. However, all students will be supported by our MTSS (multi-tiered system of support) for Mental Health and Emotional Well-Being described below:
Sherwood Montessori will support the mental health and social emotional well-being of students and staff during the school year.
Professional development for staff will include support for Tier 1 (Whole school safety and prevention, community and family engagement and supports, staff wellness, classroom strategies), Tier 2 (Early and targeted intervention for students/staff) and Tier 3 (intensive services provided in Individualized Education Plans) supports. Those include:

Tier 1:
Sherwood teachers and staff will promote a collaborative, supportive, respectful workplace environment.
Sherwood teachers will establish a culture of respect and Grace and Courtesy by utilizing Positive Behavior Interventions and Supports (PBIS) that were established in prior years.
Social Emotional Learning curriculum will be implemented in all classrooms.
Teachers and staff will utilize strategies learned in professional development on the topic of trauma: frequent, positive interactions with students and colleagues; for students and staff to regulate as needed; a collaborative approach to problem-solving with students and adults; giving energized, positive regard to positive choices and behaviors and responding to negative choices and behaviors without emotive charge.

Tier 2:
Check in Check out for students struggling to meet behavioral expectations or students who would benefit from emotional support
Counseling with social work interns
Student Study Team meetings

Tier 3:
Services determined through assessment process may include Behavior Improvement Plans (BIPs), Educationally Related Mental Health Services (ERMHS), Social Work services, or Language and Speech services

Describe how teachers and school leaders, in consultation with parents, administrators, paraprofessionals, and specialized instructional support personnel, in schools operating a targeted assistance school program under Section 1115, will identify the eligible children most in need of services under this part.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

N/A

## Homeless Children and Youth Services

ESSA SECTION 1112(b)(6)

Describe the services the LEA will provide homeless children and youths, including services provided with funds reserved under Section 1113(c)(3)(A), to support the enrollment, attendance, and success of homeless children and youths, in coordination with the services the LEA is providing under the McKinney-Vento Homeless Assistance Act (42 United States Code 11301 et seq.).

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

Sherwood follows the identification, enrollment, and continued support procedures as outlined by the McKinney-Vento Act. The School Director serves as the Homeless Liaison who provides outreach to families and coordinates services between the family and other agencies. Sherwood is committed to provide a high-quality education with all supports necessary to ensure that homeless youth have the opportunity to succeed, including providing referrals to health, dental, mental health, substance abuse services, housing services, and any other appropriate services. The Homeless Liaison will assist the parents to immediately enroll the student, obtain necessary immunizations or immunization records and school records as soon as necessary and after enrollment. The Homeless Liaison will encourage parents to be involved in their child's education and ensure that parents are informed of educational and related opportunities to assist their child to be academically successful. Sherwood allocated funds from its Supplemental  Grant to provide scholarship for class projects and field trips, food, tutoring services, counseling services, and child care.

To support regular attendance for students experiencing homelessness, Sherwood will use its established MTSS plan for attendance, which includes an emphasis on affirmation of students with regular attendance through the PBIS program. Instances of truancy are tracked and addressed with parent communication via phone, email, and letters. The approach is one of offering support rather than threatening with punishment, however Sherwood will report educational neglect to the Child Services Department as required for legal Mandated Reporters.

### Student Transitions
ESSA SECTIONS 1112(b)(8), 1112(b)(10), and 1112(b)(10) (A–B)

Describe, if applicable, how the LEA will support, coordinate, and integrate services provided under this part with early childhood education programs at the LEA or individual school level, including plans for the transition of participants in such programs to local elementary school programs.

N/A

Describe, if applicable, how the LEA will implement strategies to facilitate effective transitions for students from middle grades to high school and from high school to postsecondary education including:

(A) through coordination with institutions of higher education, employers, and other local partners; and
(B) through increased student access to early college high school or dual or concurrent enrollment opportunities, or career counseling to identify student interests and skills.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

Sherwood hosts local high schools to come speak to transitioning 8th graders about opportunities in their programs. In the 2023-2024 school year, the school hosted a Career Day for middle school students with representatives from different fields sharing information with students.

### Additional Information Regarding Use of Funds Under this Part
ESSA SECTION 1112(b)(13) (A–B)

Provide any other information on how the LEA proposes to use funds to meet the purposes of this part, and that the LEA determines appropriate to provide, which may include how the LEA will:

(A) assist schools in identifying and serving gifted and talented students; and
(B) assist schools in developing effective school library programs to provide students an opportunity to develop digital literacy skills and improve academic achievement.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

The school uses base funds from its LCFF to address gifted education and to support its library.

## TITLE I, PART D

### Description of Program
ESSA SECTION 1423(1)

Provide a description of the program to be assisted [by Title I, Part D].

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

N/A

### Formal Agreements
ESSA SECTION 1423(2)

Provide a description of formal agreements, regarding the program to be assisted, between the
(A) LEA; and
(B) correctional facilities and alternative school programs serving children and youth involved with the juvenile justice system, including such facilities operated by the Secretary of the Interior and Indian tribes.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

### Comparable Education Program
ESSA SECTION 1423(3)

As appropriate, provide a description of how participating schools will coordinate with facilities working with delinquent children and youth to ensure that such children and youth are participating in an education program comparable to one operating in the local school such youth would attend.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

### Successful Transitions
ESSA SECTION 1423(4)

Provide a description of the program operated by participating schools to facilitate the successful transition of children and youth returning from correctional facilities and, as appropriate, the types of services that such schools will provide such children and youth and other at-risk children and youth.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

### Educational Needs
ESSA SECTION 1423(5)

Provide a description of the characteristics (including learning difficulties, substance abuse problems, and other special needs) of the children and youth who will be returning from correctional facilities and, as appropriate, other at-risk children

and youth expected to be served by the program, and a description of how the school will coordinate existing educational programs to meet the unique educational needs of such children and youth.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

### Social, Health, and Other Services
ESSA SECTION 1423(6)

As appropriate, provide a description of how schools will coordinate with existing social, health, and other services to meet the needs of students returning from correctional facilities, at-risk children or youth, and other participating children or youth, including prenatal health care and nutrition services related to the health of the parent and the child or youth, parenting and child development classes, child care, targeted reentry and outreach programs, referrals to community resources, and scheduling flexibility.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

### Postsecondary and Workforce Partnerships
ESSA SECTION 1423(7)

As appropriate, provide a description of any partnerships with institutions of higher education or local businesses to facilitate postsecondary and workforce success for children and youth returning from correctional facilities, such as through participation in credit-bearing coursework while in secondary school, enrollment in postsecondary education, participation in career and technical education programming, and mentoring services for participating students.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

### Parent and Family Involvement
ESSA SECTION 1423(8)

As appropriate, provide a description of how the program will involve parents and family members in efforts to improve the educational achievement of their children, assist in dropout prevention activities, and prevent the involvement of their children in delinquent activities.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

### Program Coordination
ESSA SECTION 1423(9–10)

Provide a description of how the program under this subpart will be coordinated with other Federal, State, and local programs, such as programs under title I of the Workforce Innovation and Opportunity Act and career and technical education programs serving at-risk children and youth.

Include how the program will be coordinated with programs operated under the Juvenile Justice and Delinquency Prevention Act of 1974 and other comparable programs, if applicable.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

### Probation Officer Coordination
ESSA SECTION 1423(11)

As appropriate, provide a description of how schools will work with probation officers to assist in meeting the needs of children and youth returning from correctional facilities.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

### Individualized Education Program Awareness
ESSA SECTION 1423(12)

Provide a description of the efforts participating schools will make to ensure correctional facilities working with children and youth are aware of a child's or youth's existing individualized education program.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

### Alternative Placements
ESSA SECTIONS 1423(13)

As appropriate, provide a description of the steps participating schools will take to find alternative placements for children and youth interested in continuing their education but unable to participate in a traditional public school program.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

# TITLE II, PART A

## Professional Growth and Improvement
ESSA SECTION 2102(b)(2)(B)

Provide a description of the LEA's systems of professional growth and improvement, such as induction for teachers, principals, or other school leaders and opportunities for building the capacity of teachers and opportunities to develop meaningful teacher leadership.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

**Address these questions:**
1. Please provide a description of the LEA's systems of professional growth and improvement for teachers, principals, and other school leaders.
2. Please address principals, teachers, and other school leaders separately.
3. Please explain how the systems promote professional growth and ensure improvement, including how the LEA measures growth and improvement
4. Please describe how the systems support principals, teachers, and other school leaders from the beginning of their careers, throughout their careers, and through advancement opportunities
5. Please describe how the LEA evaluates its systems of professional growth and improvement and makes adjustments to ensure continuous improvement within these systems.

N/A

## Prioritizing Funding
ESSA SECTION 2102(b)(2)(C)

Provide a description of how the LEA will prioritize funds to schools served by the agency that are implementing comprehensive support and improvement activities and targeted support and improvement activities under Section 1111(d) and have the highest percentage of children counted under Section 1124(c).

**Address these questions:**
1. Please describe the LEA's process for determining Title II, Part A funding among the schools it serves.
2. Please describe how the LEA determines funding that prioritizes CSI and TSI schools and schools serving the highest percentage of children counted under Section 1124(c).
3. Please describe how CSI and TSI schools and schools that have the highest percentage of children counted under Section 1124(c) that the LEA serves receive priority in Title II, Part A funding decisions compared to other schools the LEA serves.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

## Data and Ongoing Consultation to Support Continuous Improvement
ESSA SECTION 2102(b)(2)(D)

Provide a description of how the LEA will use data and ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under this part.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

**Address these questions:**
1. Please explain how the LEA coordinates its Title II, Part A activities with other related strategies, programs, and activities.
2. Please describe how the LEA uses data to continually update and improve activities supported under Title II, Part A.

3. Please describe how the LEA uses ongoing consultation described in Section 2102(b)(3) to continually update and improve activities supported under Title II, Part A.
4. Please describe the sources of data the LEA monitors to evaluate Title II, Part A activities and how often it analyzes this data.
5. Please describe the ways in which the LEA meaningfully consults with the following educational partners to update and improve Title II, Part A-funded activities:
    a. Teachers
    b. Principals and other school leaders
    c. Paraprofessionals (including organizations representing such individuals)
    d. Specialized instructional support personnel
    e. Charter school leaders (in a local educational agency that has charter schools)
    f. Parents
    g. Community partners
    h. Organizations or partners with relevant and demonstrated expertise in programs and activities
6. Please explain how often the LEA meaningfully consults with these educational partners.

## TITLE III, PART A

### Title III Professional Development
ESSA SECTION 3115(c)(2)

Describe how the eligible entity will provide effective professional development to classroom teachers, principals and other school leaders, administrators, and other school or community-based organizational personnel.

Complete responses will:

Address professional development activities specific to English learners/Title III purposes that are:

1. designed to improve the instruction and assessment of English learners;
2. designed to enhance the ability of such teachers, principals, and other school leaders to understand and implement curricula, assessment practices and measures, and instructional strategies for English learners;
3. effective in increasing children's English language proficiency or substantially increasing the subject matter knowledge, teaching knowledge, and teaching skills of such teachers;
4. of sufficient intensity and duration (which shall not include activities such as one-day or short-term workshops and conferences) to have a positive and lasting impact on the teachers' performance in the classroom; and
5. supplemental to all other funding sources for which the LEA is eligible.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

N/A

### Enhanced Instructional Opportunities
ESSA SECTIONS 3115(e)(1) and 3116

Describe how the eligible entity will provide enhanced instructional opportunities for immigrant children and youth.

Complete responses will:

1. Describe the activities implemented, supplemental to all other funding sources for which the LEA is eligible, that provide enhanced instructional opportunities for immigrant children and youth.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

### Title III Programs and Activities
ESSA SECTIONS 3116(b)(1)

Describe the effective programs and activities, including language instruction educational programs, proposed to be developed, implemented, and administered under the subgrant that will help English learners increase their English language proficiency and meet the challenging State academic standards.

Complete responses will:
1. Address the effective language instruction programs specific to English learners.
2. Address Title III activities that:
    - are focused on English learners and consistent with the purposes of Title III;
    - enhance the core program; and
    - are supplemental to all other funding sources for which the LEA is eligible.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

## English Proficiency and Academic Achievement

ESSA SECTIONS 3116(b)(2)(A-B)

Describe how the eligible entity will ensure that elementary schools and secondary schools receiving funds under Subpart 1 assist English learners in:

(A) achieving English proficiency based on the State's English language proficiency assessment under Section 1111(b)(2)(G), consistent with the State's long-term goals, as described in Section 1111(c)(4)(A)(ii); and
(B) meeting the challenging State academic standards.

Complete responses will:

1. Address how sites will be held accountable for meeting English acquisition progress and achievement goals for English learners.
2. Address site activities that are supplemental to all other funding sources for which the LEA is eligible.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

## TITLE IV, PART A

### Title IV, Part A Activities and Programs

ESSA SECTION 4106(e)(1)

**Each LEA, or consortium of LEAs, shall conduct the Title IV needs assessment once every 3 years. (see below)**

Describe the activities and programming that the LEA, or consortium of such agencies, will carry out under Subpart 1, including a description of:

(A) any partnership with an institution of higher education, business, nonprofit organization, community-based organization, or other public or private entity with a demonstrated record of success in implementing activities under this subpart;
(B) if applicable, how funds will be used for activities related to supporting well-rounded education under Section 4107;
(C) if applicable, how funds will be used for activities related to supporting safe and healthy students under Section 4108;
(D) if applicable, how funds will be used for activities related to supporting the effective use of technology in schools under Section 4109; and
(E) the program objectives and intended outcomes for activities under Subpart 1, and how the LEA, or consortium of such agencies, will periodically evaluate the effectiveness of the activities carried out under this section based on such objectives and outcomes.

NOTE: If the LEA received more than $30,000 in Title IV, Part A funding and did not transfer the allocation, the LEA must:

1. use not less than 20 percent of Title IV, Part A funds to support one or more safe and healthy student activities;
2. use not less than 20 percent of Title IV, Part A funds to support one or more well-rounded education activities;
3. use a portion of Title IV, Part A funds to support one or more effective use of technology activities; and
   a) 15 percent max cap on effective use of technology for purchasing technology infrastructure.

**THIS ESSA PROVISION IS ADDRESSED BELOW:**

A) Sherwood will partner with the California State University at Chico for counseling interns from the School of Social Work and with Tula Therapy, a nonprofit organization with counseling providers who specialize in children and family counseling. It will also partner with Parsec Education to provide professional development for teachers and administration to understand how to best use data for advancing student achievement.

(B) Formerly supported withe ESSER funding, we have found counseling for many students was needed to give them access to a well-rounded education by improving attendance and behavior that leads to learning. Improving use of data with the support of trained statisticians will also support a well-rounded education to students by having teacher planned lessons based on data.

(C) Partnering with the university and a community based program will support students to use non-violent conflict resolution, emotional regulation, and make safe and healthy choices.

(D) N/A, Microsoft Settlement Grant funds are bing used for technology.

(E) The Univesity has developed an evaluation system for their counseling interns that assesses their effectivenss. Sherwood collects data from students and families annually to assess effectiveness of wellness counseling programming.

Sherwood will not receive more than $30,000 in Title IV funds.

## Title IV, Part A Needs Assessment

According to the Every Student Succeeds Act (ESSA), all local educational agencies (LEAs) receiving at least $30,000 must conduct a needs assessment specific to Title IV, Part A (ESSA Section 4106[f]). Each LEA, or consortium of LEAs, shall conduct the needs assessment once every three year (ESSA Section 4106[d][3]).

### Well-rounded Education Opportunities (ESSA Section 4107)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support for a well-rounded education?

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

### Safe and Healthy Students (ESSA Section 4108)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support for safety and health of students?

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

### Effective Use of Technology (ESSA Section 4109)

Identify any indicators, or measures/data points to examine needs for improvement of the Title IV, Part A priority content areas.

What activities will be included within the support of effective use of technology? Note: No more than 15 percent on technology infrastructure (ESSA Section 4109[b])

How will the activities be evaluated for the effectiveness of strategies and activities funded under Title IV, Part A. Include the indicators, or measures/data points used to determine future program planning?

- Note: All planned activities must meet the authorized use of funds criteria located on the Title IV, Part A Authorized Use of Funds web page at https://www.cde.ca.gov/sp/st/tivpaauthuseoffunds.asp.

Date of LEA's last conducted needs assessment:

Sherwood will receive less than $30,000 in Title IV, Part A so will not be completing a comprehensive needs assessment. The process to develop the LCAP is Sherwood's comprehensive needs assessment, conducted annually.

Title IV, Part A Program
Rural Education and Student Support Office
California Department of Education
Email: TitleIV@cde.ca.gov Web site: https://www.cde.ca.gov/sp/st/

California Department of Education
February 2022

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** May 16, 2024

---

**SUMMARY**

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

**DISCUSSION**

In order to received 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)



# 2024–25 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.

By checking this box the LEA certifies that the Local Board has approved the Application for Funding for the listed fiscal year: ☐

## 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.

By checking this box the LEA certifies that parent input has been received from the District English Learner Committee (if applicable) regarding the spending of Title III funds for the listed fiscal year: ☐

## 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):** ○ No ◉ Yes
ESSA Sec. 1111 et seq.
SACS 3010

*** Title II, Part A (Supporting Effective Instruction):** ◉ No ○ Yes

| | |
|---|---|
| ESEA Sec. 2104<br>SACS 4035 | |
| *** Title III English Learner**:<br>ESEA Sec. 3102<br>SACS 4203 | ◉ No ○ Yes |
| *** Title III Immigrant:**<br>ESEA Sec. 3102<br>SACS 4201 | ◉ No ○ Yes |
| *** Title IV, Part A (Student and School Support):**<br>ESSA Sec. 4101<br>SACS 4127 | ○ No ◉ Yes |

Save Return to List

**Consolidated Application Support Desk, Education Data Office | ConAppSupport@cde.ca.gov | 916-319-0297**
**General CARS Questions: Consolidated Application Support Desk | conappsupport@cde.ca.gov | 916-319-0297**

California Department of Education
1430 N Street
Sacramento, CA 95814

Web Policy

# SHERWOOD MONTESSORI

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

Date/Time: Wednesday, June 19, 2024 – 6:00 p.m.
Location: Room 1, 1071 E 16th Street, Chico, CA 95928

**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, Tina Hanson-Lewis, Kati Boomgarden, Emma Cluff, Sami Lawson

**B.1 Commendations** Outgoing directors will receive commendations.
**B.2 Minutes Approval** Consider approval of minutes from Regular Meeting, May 16, 2024.

**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.*

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

**E.3 Action Items** (6:30)

**E.3.1 Original Budget 2024-2025**
The Board will be asked to adopt a budget for the 2024-2025 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.

**E.3.4 Class Assignment Policy**
The Board will be asked to approve a Class Assignment Policy.
**ACTION REQUESTED:** Approve policy.

**E.3.5 Title IX Policy**
The Board will be asked to approve a Title IX Policy.
**ACTION REQUESTED:** Approve policy.

**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 061924a**
**RESOLUTION OF COMMENDATION**

***WHEREAS, Kati Boomgarden*** *was first elected to serve on the Board of Directors of Sherwood Montessori in June, 2023, and continued her service for the 2023-2024 school year, during which she rarely missed a meeting; and*

***WHEREAS****, she has consistently brought to the proceedings a sense of gravitas to the Mission of Sherwood Montessori; and*

***WHEREAS,*** *Kati has discharged her Board duties as a Board Member with a high level of competence, preparedness and objectivity; and*

***WHEREAS****, Kati brought to Sherwood Montessori her perspective as a parent and community member; and*

***WHEREAS****, Kati consistently demonstrated teamwork and clear communication; and*

***WHEREAS,*** *Kati 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 Kati Boomgarden 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 Kati Boomgarden 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 19th day of June, 2024.*

Michelle Yezbick, Director
Sherwood Montessori

Russell Shapiro, Chair of the Board
Sherwood Montessori

SHERWOOD MONTESSORI

**RESOLUTION 061924b**
**RESOLUTION OF COMMENDATION**

***WHEREAS, Russell Shapiro*** *was first appointed to serve on the Board of Directors of Sherwood Montessori as the founding Chair of Board in December, 2009, and continued his service for a period of 3 years and eight months, during which he rarely missed a meeting; and*

***WHEREAS,*** *he returned to serve an additional year on the Board during the 2014-2015 school year; and*

***WHEREAS,*** *Russell returned again to serve on the Board during the eventful March of 2020, and remained in service during some of the most challenging times in the history of School Boards for human beings, and*

***WHEREAS****, Russell has, during these many years of service, served in the role of Board Treasurer and the role of Board Chair, and*

***WHEREAS,*** *Russell brought to the Board a knowledge of the school's history from the very beginning with his own unique perspective as a founder, a parent, and a community member; and*

***WHEREAS****, Russell brought to Sherwood Montessori a critical yet positive perspective, a joy for lifelong learning as a scholar, and a profound respect for the Montessori method of education; and*

***WHEREAS,*** *Russell 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 of Russell Shapiro 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 Russell Shapiro 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 19th day of June, 2024.*

Michelle Yezbick, Director
Sherwood Montessori

Tina Hanson-Lewis , Vice Chair of the Board
Sherwood Montessori

Meeting Notes 5/16/24

**A. CALL TO ORDER** (6:10 p.m.)
**A.1 Land Acknowledgement (read by Michelle)**

**A.2 Roll Call** Russell Shapiro (on zoom), Kati Boomgarden, Emma Cluff, Sami Lawson

**B. CONSENT AGENDA** (6:12)
**B.1 Minutes Approval** Consider approval of minutes from Regular Meeting, March 28, 2024.
- Motioned by Emma, Seconded by Sami, unanimously 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.
- April spoke - April reviewed her concerns from a parent's perspective about the events of the beginning of the school year.
- Daniel Green - Expressed concerns that April is leaving and his perceived reasons behind that.
- Amy - Expressed noticing change in school culture from a parent's perspective. Expressed concerns about bullying at Sherwood, and concerns about April leaving.

**D. NOTICED PUBLIC HEARINGS**
**None**

**E. REGULAR BUSINESS** (6:28)

**E.2 Reports and Communications** (6:28)
*This time will be for Board members to ask questions regarding the provided written materials.*
**E.2.1 Instructional Staff Report (6:32)**
- Thersea shared in person

**E.2.2 School Director Report (6:35)**
- Michelle briefly discussed with the board

**E.2.3 Treasurer Report (6:39)**
- Pat briefly discussed with the board

**E.2.5 NorCal Educational Leadership Team (6:47)**
- Presentation given by Thersea and Leslie

**E.3 Action and Discussion Items** (7:05)

**E.3.1 Local Control Accountability Plan (LCAP; 7:05)**
The Board will be asked to discuss the LCAP and allow for public input. **Action Requested:** Discuss plan.

**E.3.2 Calendar Revision**
- Kati motioned, Sami seconded, unanimously approved

**E.3.3 LCAP Federal Addendum**

The Board will be asked to approve the updated Federal Addendum. **ACTION REQUESTED:** Approve the Federal Addendum.

- Emma motioned, Kati seconded, unanimously approved

**E.3.4 CARS Application**

The Board will be asked to approve the Consolidated Application for Federal Funding **ACTION REQUESTED**: Approve application.

- Sami motioned, Emma Seconded, unanimously approved

**F. CLOSED SESSION** (7:22)

**F.1 Public Employee Performance Evaluation**

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

**G. FUTURE AGENDA ITEMS** (7:30)

The Board will be asked to adopt the 2024-2025 Local Control Accountability Plan (LCAP) and approve the Original Budget for 2024-2025.

**H. ADJOURNMENT** (8:15)

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** June 19, 2024

---

**Administrative**

- We have hired two new teachers to fill the vacancies we had for the upcoming school year. Both teachers have state teaching credentials, and both are eager to take the Montessori training.
- Anne Adams will be moving up to one of the upper elementary positions, giving us one veteran teacher and one new teacher at each of the elementary levels.
- All of the elementary classrooms will be located in the quad building, creating partnering opportunities and movement among the classrooms greater potential. Interior doors in the classrooms mean students and teachers will have access to neighbors. Middle school and the Learning Center will move to the classrooms previously occupied by the upper elementary classrooms.
- Students finished their state testing, and most results were in before the last day of school. Although results are not yet available to the public, it appears that we may have come in a bit further from standard than in 2023. This is not surprising considering the increase in absenteeism for students and teachers, the increase in class size, and less aide time available in the past school year.
- Sherwood's NorCal Educational Leadership Consortium team attended a two-day conference on Chico State's campus. We presented our work on continuous improvement of our PBIS program, attended lectures on topics of interest, and learned about the opportunity to continue our work. Next year, the team will work on integrating systemic social-emotional learning (SEL) into our program.

**Community & Promotion**

- We had school tours up to the last week of school, and we've had a few since then. People continue to use the "Request a Tour" button on our website to set up tours as they move to Chico over the summer or check out options for their children.

- Our 8th Grade Promotion event on the last day of school was a beautiful event and many parents and family members attended. Each student was honored for moving up to the next grade, with special attention was given to students moving to the next level and, of course, the 8th graders.

**Safety**

- We had extreme heat on some of the last days of school. The Learning Center was open during recess as an optional cooling center and staff watched closely for signs of overheating in the students.

SHERWOOD MONTESSORI

**To:** Board of Directors

**From:** Pat Casey, Business Manager

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

**Date:** June 19, 2024, Board Meeting

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Bank statement reconciliation

- The Business Manager has verified that the beginning and ending cash balances on Sherwood's bank statements for the month of May 2024 reconciled with and matched those of the school's internal reports. The bank Ending Balance cash totaled $ 694,558.46 as of May 31,2024 for the checking account.
- The expenses in May were for the normal operating cost.

Profit & Loss

The May 2024 Profit & Loss report shows a Net Income of $ -61,924, with added amounts of $ 56,734 LCF funds deposited in June 2024 along with $8,214 for ELOP and $ 2,840 for Prop 28 Art/Music. The actual Net Income for May 2024 is $ 5,864.

Cash Flow

The school will end the year with a positive cash balance based on P2 ADA of 104.
The Legislative Analyst's Office and Governor are expecting a smaller deficit than originally announced in January 2024.
The COLA for revenue limit calculations was 3.94% in the original Governor's budget but has been revised down to 1.07%.
Final LCF, ELOP and UPK numbers will be announced after the June 30th budget adoption.

# Sherwood Montessori
## Profit & Loss YTD Comparison
May 2024

| | May 24 |
|---|---|
| **Ordinary Income/Expense** | |
| **Income** | |
| **8000-Revenues** | |
| **8010-8099 Revenue Limit Sources** | 86,673 |
| **8300-8599 Other State Revenue** | 16,557 |
| **8600-8799 Other Local Revenue** | 17,075 |
| **Total 8000-Revenues** | 120,305 |
| **Total Income** | 120,305 |
| **Gross Profit** | 120,305 |
| **Expense** | |
| **1000 Certificated Salaries** | 56,742 |
| **2000 Classified Salaries** | 47,597 |
| **3000-Employee Benefits** | 29,539 |
| **4000-Books and Supplies** | 3,746 |
| **5000 Services/Other Op. Exp.** | 44,605 |
| **Total Expense** | 182,229 |
| **Net Ordinary Income** | -61,924 |
| **Net Income** | **-61,924** |

# Sherwood Montessori
## Board of Directors - Vendor Payments Report
### May 2024

| Type | Date | Num | Name | Memo | Account | Amount |
|---|---|---|---|---|---|---|
| Check | 05/01/2024 | 9833 | Feather River Center | boat trip April's class- 20 stude... | Field Trips and Assemblies | 700.00 |
| Check | 05/01/2024 | 9834 | Stacy .Gertz | ART SUPPLIES | Instructional Supplies | 64.39 |
| Check | 05/01/2024 | EFT | Heather Fisher | PBIS LUNCH MEETING | Food - Meetings | 42.98 |
| Check | 05/01/2024 | ACH | Macquarie Equipment Capital... | Kyocera Copier Lease 2024 M... | Copier Lease | 223.00 |
| Check | 05/02/2024 | 9836 | Advanced Document | SERVICE 2024 APRIL | Copier Lease | 768.46 |
| Check | 05/02/2024 | 9837 | MEMORY BOOK COMPANY | YEARBOOK 2023-24 | Contracted Service | 1,900.98 |
| Check | 05/02/2024 | EFT | Comcast 4454 | SERVICE - 2024 APR-MAY | Internet Service Provider | 471.34 |
| Check | 05/02/2024 | 9838 | PARK AVENUE PEST CONT... | SERVICE 2024 APRIL | Pest Control | 85.00 |
| Check | 05/02/2024 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conferences | 100.00 |
| Check | 05/02/2024 | DBT | ARCO PUMPPASS | Gas cards | 5200-Travel and Conferences | 100.00 |
| Check | 05/02/2024 | DBT | Promevo | Chrome management console ... | Contracted Service | 114.00 |
| Check | 05/02/2024 | DBT | WINCO FOODS | CLOROX WIPES | Office Supplies | 14.06 |
| Check | 05/06/2024 | 7603 | Carla Lopez-Mercado | DONATION - intern contract | Contracted Service | 2,700.00 |
| Check | 05/06/2024 | 7604 | Paula Gomes Barroso | DONATION - intern contract | Contracted Service | 2,700.00 |
| Check | 05/06/2024 | DBT | FoodMaxx | SMPO TEACHER APPRECIA... | Food - Meetings | 31.68 |
| Check | 05/06/2024 | DBT | Amazon.com | SUMMER PROGRAM SUPPLI... | Extended Day | 66.95 |
| Check | 05/08/2024 | DBT | Law Offices of Young, Minne... | TITLE IX REGS | Attorney | 75.00 |
| Check | 05/09/2024 | DBT | Costco | SNACKS | Food (Instructional) | 537.31 |
| Check | 05/10/2024 | EFT | Waste Management | SERVICE - 2024 APRIL | Trash/Recycling | 140.44 |
| Check | 05/10/2024 | 9839 | City of Chico | SERVICE - 2024 APRIL | Sewer | 28.87 |
| Check | 05/10/2024 | 9840 | Chico Country Day | NURSE CONTRACT INV 1002... | Contracted Service | 1,298.72 |
| Check | 05/10/2024 | 9841 | Hernandez Cleaning Service | SERVICE 2024 APRIL | Housekeeping Services | 4,830.00 |
| Check | 05/10/2024 | 9842 | Marlo . Knox | Supplies | Instructional Supplies | 228.51 |
| Check | 05/10/2024 | EFT | California Water Service Com... | SERVICE 2024 APRIL | Water | 22.20 |
| Check | 05/10/2024 | EFT | Laura Swanson {Other} | FOOD-UTENSILS | Contracted Service | 25.15 |
| Check | 05/12/2024 | DBT | NCMPS | ANNUAL MEMBERSHIP | 5300-Dues and Membership | 130.00 |
| Check | 05/14/2024 | DBT | Safeway | CRYSTAL GEYSER 4- BIKE T... | Instructional Supplies | 30.30 |
| Check | 05/14/2024 | DBT | Johnny's Chico Lock and Safe | KEYS | Office Supplies | 42.04 |
| Check | 05/15/2024 | 9843 | HM&S | 2022-23 AUDIT FEE BALANCE | Auditing and CPA Services | 11,367.50 |
| Check | 05/15/2024 | EFT | Heather Fisher | MARLO-MANDARINS | Food (Instructional) | 22.76 |
| Check | 05/15/2024 | EFT | Laura Swanson {Other} | BEADS | Instructional Supplies | 14.05 |
| Check | 05/15/2024 | EFT | PG & E | SERVICE APRIL 2024 | Electricity | 565.70 |
| Check | 05/15/2024 | DBT | Johnny's Chico Lock and Safe | KEYS | Office Supplies | 24.03 |
| Check | 05/16/2024 | 7605 | Laura Swanson | FOOD-UTENSILS | Contracted Service | 25.15 |
| Paym... | 05/16/2024 | 300528... | BCOE | | 9200-Accounts Receivable | -2,000.00 |
| Check | 05/17/2024 | ACH | COSTCO VISA CARD | THRU 15TH PURCHASES 20... | SHERWOOD COSTCO VISA | 9,294.82 |
| Check | 05/20/2024 | DBT | Wufoo | SERVICE - 2024 APR-MAY | Online List Management | 19.00 |
| Check | 05/21/2024 | DBT | FoodMaxx | Anne | Food (Instructional) | 17.07 |
| Check | 05/21/2024 | DBT | FoodMaxx | Marlo | Food (Instructional) | 17.07 |
| Check | 05/22/2024 | DBT | Finch & Sparrow | SPEECH THERAPIST | Contracted Service | 4,320.00 |
| Check | 05/22/2024 | DBT | Amazon.com | SUPPLIES | Instructional Supplies | 238.53 |
| Check | 05/23/2024 | DBT | Amazon.com | MEMBERSHIP MMAY 2024 | 5300-Dues and Membership | 16.23 |
| Check | 05/23/2024 | EFT | Comcast Business 9110 | SERVICE - 2024 APR-MAY | Telephone, Landline | 187.49 |
| Check | 05/23/2024 | ACH | Intuit | QuickBooks ENTERPRISE | Software Licensing | 1,922.00 |
| Check | 05/23/2024 | DBT | Verizon Wireless | 872055494-00001 | Telephone, Cellular | 97.53 |
| Check | 05/23/2024 | 9844 | Comcast - Fiber Optic 2574 | SERVICE MAY 2024 | Ethernet - Fiberoptic | 734.66 |
| Check | 05/23/2024 | 9845 | Stacy .Gertz | SUPPLIES | Instructional Supplies | 145.45 |
| Check | 05/24/2024 | DBT | TEA BAR CAFE | PBIS MTG | Food - Meetings | 41.88 |
| Check | 05/28/2024 | DBT | Linkedin | JOB AD - TEACHER | Advertising | 300.00 |
| Check | 05/29/2024 | DBT | Costco | SNACKS | Food (Instructional) | 446.34 |
| Check | 05/29/2024 | DBT | Amazon.com | SUPPLIES | Office Supplies | 23.00 |
| Check | 05/29/2024 | EFT | Jessica Lusardi | SNACKS | Instructional Supplies | 187.44 |
| Check | 05/29/2024 | EFT | Comcast 4454 | SERVICE - 2024 APR-MAY | Internet Service Provider | 471.34 |
| Check | 05/29/2024 | DBT | Amazon.com | SUMMER PROGRAM SUPPLI... | Extended Day | 47.58 |
| Check | 05/29/2024 | 9847 | Southern Oregon University | HOUSING - ASHLAND FIELD ... | Field Trips and Assemblies | 0.00 |
| Check | 05/30/2024 | DBT | Amazon.com | PAPER | Instructional Supplies | 14.49 |
| Check | 05/30/2024 | 9848 | CUSD | FUA INV24-00154 APR 24 | CUSD FUA Charges | 1,815.45 |
| Check | 05/30/2024 | 9849 | Adam Mankoski | SUPPLIES-PUZZLES-SAND | Instructional Supplies | 48.16 |
| Check | 05/31/2024 | DBT | Amazon.com | CALENDAR - VANESSA | Office Supplies | 8.11 |
| Bill | 05/31/2024 | | Pat Casey | CONTRACT SERVICES MAY ... | Business Manager Services | 4,700.00 |
| **TOTAL** | | | | | | **52,604.21** |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **2024-2025 Original Budget**

**Date:** June 19, 2024

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**SUMMARY**

The Budget Committee met on June 5th to give input for the draft of the original budget for 2024-2025.

**DISCUSSION**

Assumptions for creating the proposed budget included:

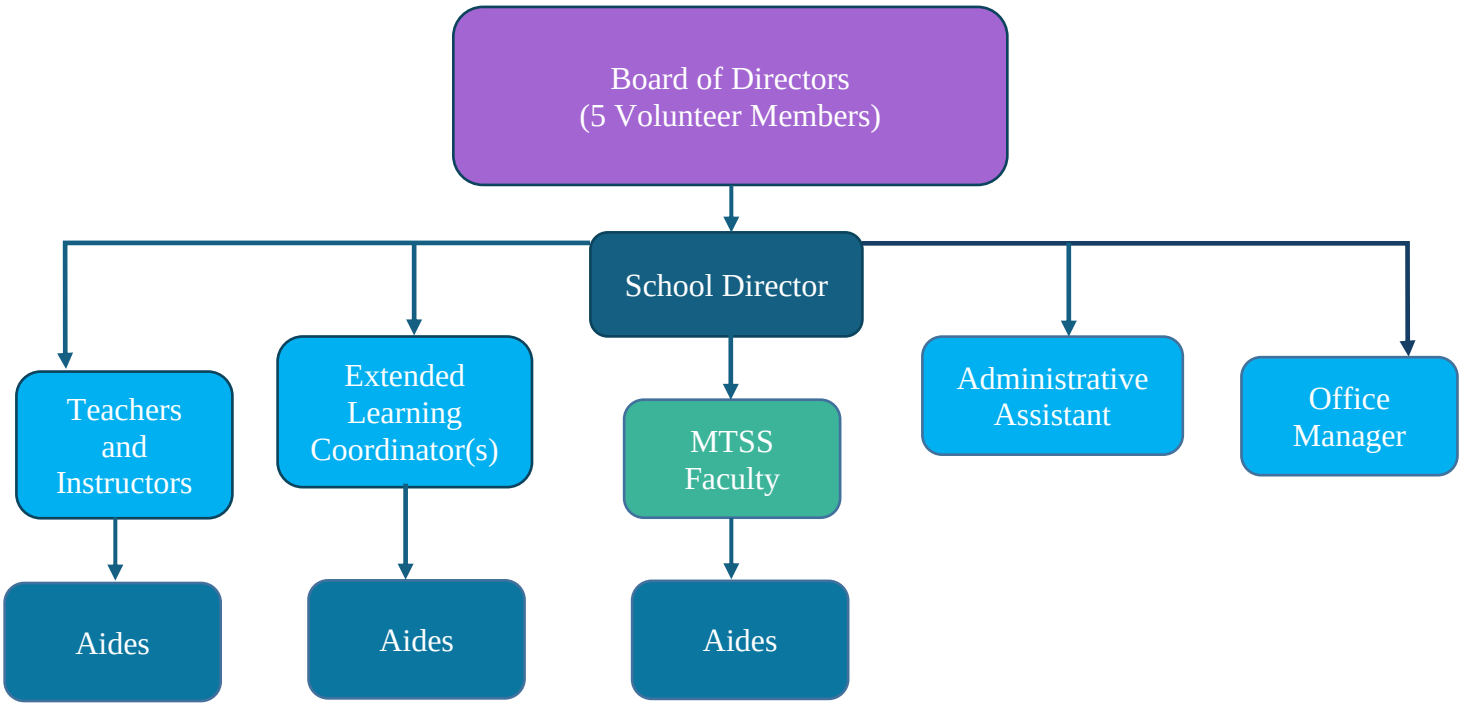
Governor's Proposal assumed to be accepted by Legislature.
Budget based on 115 ADA.
2.5% increase on teachers' salary schedule, 2.5% step (year) increase-returning staff will see 5% increase in salary.
Classified staff who are returning will have a 2.5% step increase in hourly salary.

**ACTION REQUESTED**

Adopt 2024-2025 Original Budget

Attachments: Draft of 2024-2025 Original Budget, Organizational Chart

| 2024-25 | FUNDING AT 117 ADA | | | FUNDS TIED TO |
|---|---|---|---|---|
| 6/19/2024 | 127 Enroll. x 92% attendance | CHANGE | | STATE DEFICIT |
| **ORIGINAL BUDGET** | **2024-25 ORIGINAL BUDGET** | | | |
| **Revenue** | | | | |
| 8011 Local Control Funding | *658,137* | | | |
| 8012 Education Protection Act | *368,195* | | | |
| 8096 In Lieu Taxes | *350,000* | | | |
| Subtotal LCFF Revenues | *1,376,332* | 98,208 | *7.68%* | 1,376,332 |
| 8290 - TITLE I | **50,000** | - | | |
| 8181 - Spec. Educ.- SELPA Fed | 15,754 | - | | |
| 8311 - Spec. Educ. - SELPA State | 92,337 | - | | |
| 8312 - Spec. Educ. - SELPA ERMHS | 5,600 | - | | |
| 8550 - Mandates Block Grant | 2,500 | - | | |
| 8560 - State Lottery | 25,000 | - | | |
| 8590 - ELOP | *70,000* | - | | 70,000 |
| 8590 - UPK - LCFF CALC | *43,075* | - | | 43,075 |
| 8699 Other Local Revenue | 3,000 | - | | |
| **TOTAL REVENUES** | **1,683,598** | - | | *1,489,407* |
| **Expense** | | | | |
| 1000 Certificated Salaries | 559,300 | | 28% | |
| 2000 Classified Salaries | 581,411 | | 29% | |
| 3000 Employee Benefits | 362,229 | | 18% | |
| **SUBTOTAL** | *1,502,940* | | 75% | |
| 4100 Texts and Core Curricula | 1,500 | | | |
| 4200 Reference Materials | 1,500 | | | |
| 4300 Materials and Supplies | 55,200 | | | |
| 4400 NonCap Equipment | 3,000 | | | |
| 4700 Food (Nutrition) | 800 | | | |
| **SUBTOTAL** | *62,000* | | 3% | |
| 5200 Travel and Conferences | 5,400 | | | |
| 5300 Dues and Memberships | 2,000 | | | |
| 5400 Property/Liability Insurance | 40,000 | | | |
| 5500 Operations / Housekeeping | 91,000 | | | |
| 5600 Rentals, Leases, and Repairs | 13,000 | | | |
| 5800 Prof. & Consulting Services | 269,000 | | 13% | |
| 5900 Communications | 28,300 | | | |
| **SUBTOTAL** | *448,700* | | 22% | |
| **TOTAL EXPENDITURES** | **2,013,640** | **183,156** | 100% | |
| **Net Income** | *(330,042)* | **ADA Equiv.** | **-30** | |
| **Restricted Funds - Prior Year** | **44,000** | | | |
| **Net Income - Unrestricted** | **(286,042)** | **ADA Equiv.** | **-26** | |
| **Unassigned/Unappropriated - Prior Year** | **600,000** | | | |
| **Net Unassigned/Unappropriated** | **313,958** | | | |
| **Unassigned/Unappropriated - Yr End Proj..** | **193,958** | **ADA Equiv.** | **18** | |
| **Reserve - Economic Uncertainties** | **120,000** | **Est. 1 mos. salary/benes.** | | |




Contracted Services

- Business Manager
- Custodial
- School Nurse
- Adapted Physical Education
- Legal Services
- Speech and Language Pathologist
- Pest Management
- Landscaping & Facilities Repair & Maintenance
- Wellness Center Counselors
- Mental Health Service Providers

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

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

**Date:** June 19, 2024

---

**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 Coffee with the Director meetings, held five times this past year, became another vehicle for our community to give input. Students give input with a Student Survey, teachers and staff give input in meetings. The draft attached here was created from survey input, data from the CDE Dashboard, local data, input from parent meetings, and input given at the Regular Meeting of the Board of Directors on May 16, 2024.

**ACTION REQUESTED**

Adopt LCAP.

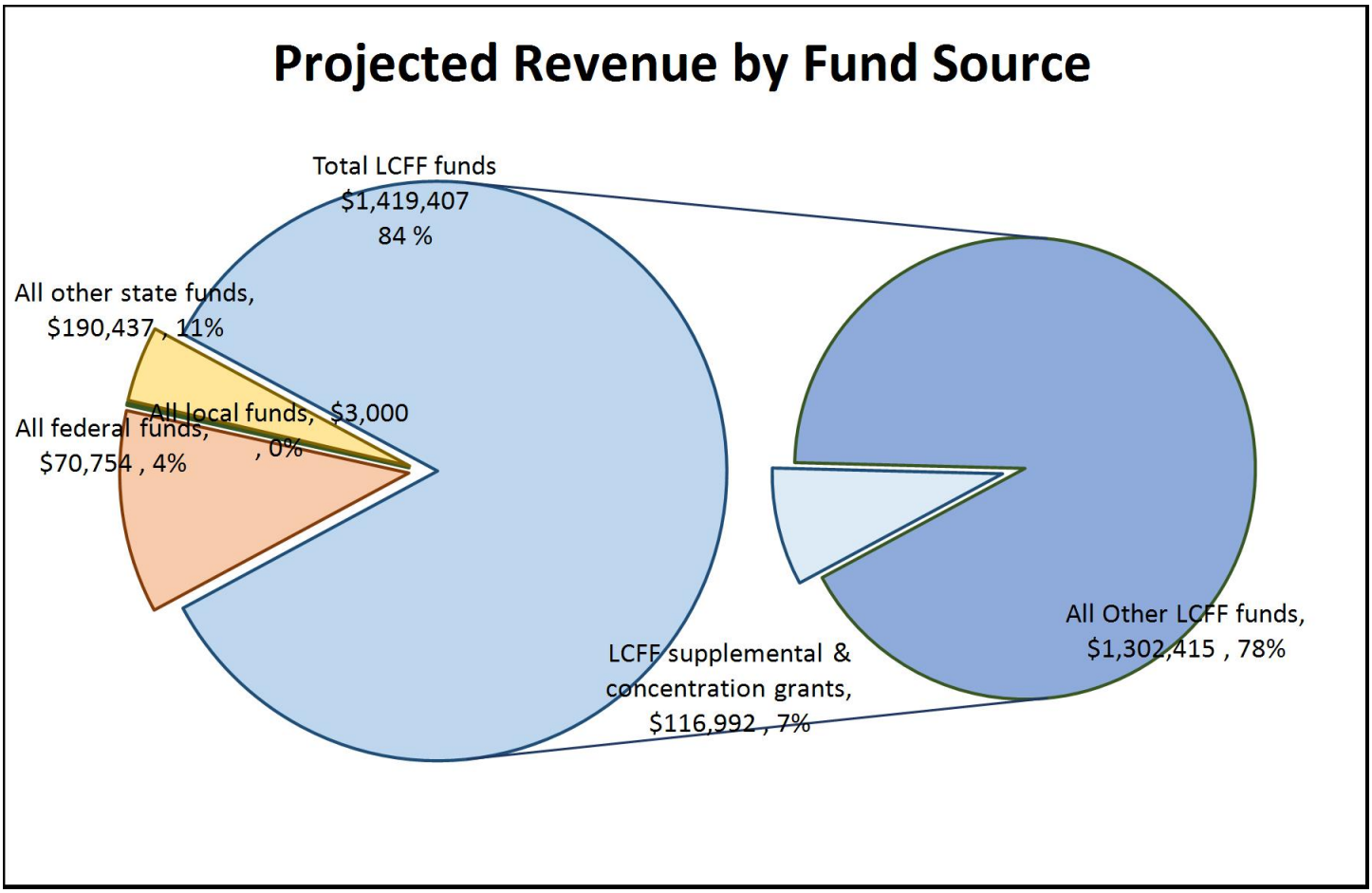
Attachment: DRAFT LCAP 2024-2025

# LCFF Budget Overview for Parents

Local Educational Agency (LEA) Name: Sherwood Montessori
CDS Code: 04614240121475
School Year: 2024-25
LEA contact information:
Michelle Yezbick
Director
michelle@sherwoodmontessori.org
(530)345-6600

School districts receive funding from different sources: state funds under the Local Control Funding Formula (LCFF), other state funds, local funds, and federal funds. LCFF funds include a base level of funding for all LEAs and extra funding - called "supplemental and concentration" grants - to LEAs based on the enrollment of high needs students (foster youth, English learners, and low-income students).

## Budget Overview for the 2024-25 School Year

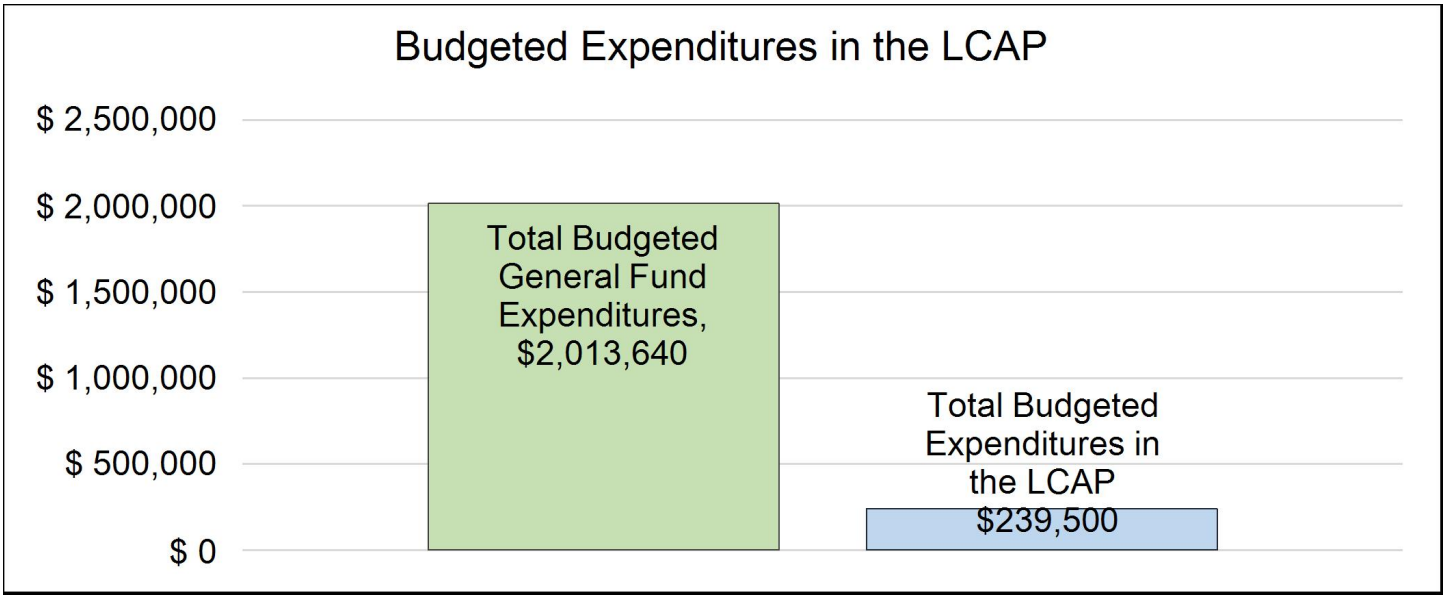



This chart shows the total general purpose revenue Sherwood Montessori expects to receive in the coming year from all sources.

The text description for the above chart is as follows: The total revenue projected for Sherwood Montessori is $1,683,598, of which $1,419,407 is Local Control Funding Formula (LCFF), $190,437 is other state funds, $3,000 is local funds, and $70,754 is federal funds. Of the $1,419,407 in LCFF Funds, $116,992 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 2024-25. 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 $2,013,640 for the 2024-25 school year. Of that amount, $239,500 is tied to actions/services in the LCAP and $1,774,140 is not included in the LCAP. The budgeted expenditures that are not included in the LCAP will be used for the following:

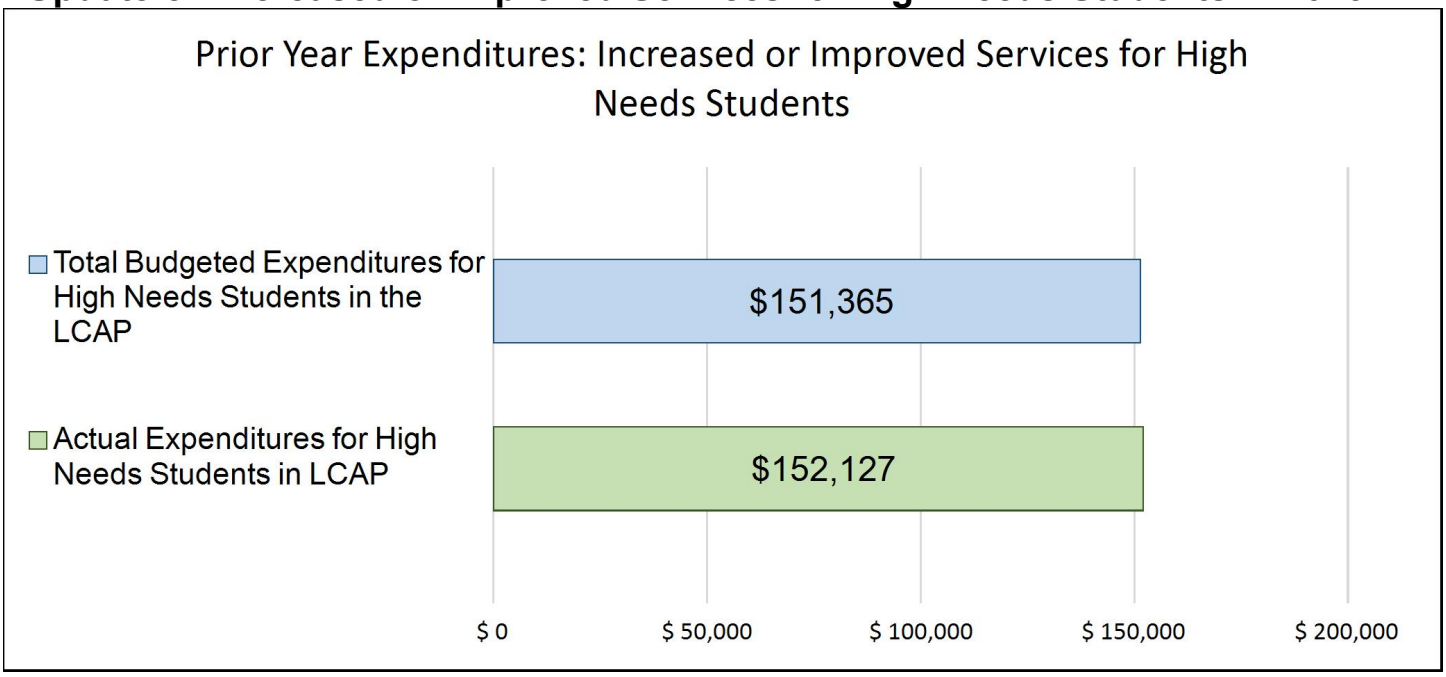
Salaries and benefits for employees are not entirely included in the LCAP, as well as cost for facilities and utilities, discretionary classroom and program budgets, and materials.

## Increased or Improved Services for High Needs Students in the LCAP for the 2024-25 School Year

In 2024-25, Sherwood Montessori is projecting it will receive $116,992 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 $117,000 towards meeting this requirement, as described in the LCAP.

# LCFF Budget Overview for Parents

## Update on Increased or Improved Services for High Needs Students in 2023-24




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 2023-24, Sherwood Montessori's LCAP budgeted $151,365 for planned actions to increase or improve services for high needs students. Sherwood Montessori actually spent $152,127 for actions to increase or improve services for high needs students in 2023-24.

# 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<br>Director | michelle@sherwoodmontessori.org<br>(530)345-6600 |

# Plan Summary [2024-25]

## 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 114 students with multi-age groups. We have two classrooms with learners ages 4-6 (TK/K), two 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 and Title IV Part D funds herein accounted for. The process used to create this plan satisfies all requirements for creating a SPSA.

# Reflections: Annual Performance

A reflection on annual performance 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 level of academic challenge and the support given to students who need academic challenge and the curriculum in terms of Montessori authenticity. The greatest decrease was in overall satisfaction and students' emotional well-being at school and school climate in general. Areas that remained high in satisfaction included the teachers and school climate in terms of repectfulness and inclusivity.

Sherwood made great gains in CAASPP scores for both ELA and math between 2022 and 2023. Scores increased 25.1 points to 36.6 Points Below Standard for ELA and 50.6 points to 49.6 Points Below Standard for math. Our 2024 scores are not yet available. Chronic absenteeism dropped in 2022-2023 from 34.9% in 2021-2022 to 23.6% in 2022-2023. At mid-year, we had a 12% chronic absenteeism rate, but by the end of the year the rate had increased to 35%. Our suspension rate increased from 3.4% in 2022-2023 to 5.26% in 2023-2024.

# Reflections: Technical Assistance

As applicable, a summary of the work underway as part of technical assistance.

N/A Sherwood was identified for ATSI (Additional Targetd Support and Improvement) for chronic absenteeism in 2022-2023 due to a rate of 34.9% chronic absenteeism in 2021-2022, but made significant improvement (rate dropped to 23.6%) and is no longer eligible.

# 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.

N/A

## *Support for Identified Schools*

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

N/A

## *Monitoring and Evaluating Effectiveness*

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

| |
|---|
| N/A |

# Engaging Educational Partners

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

| Educational Partner(s) | Process for Engagement |
| --- | --- |
| | |

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

The Sherwood Community Survey was promoted in the School Announcements on April 4 and was available April 11th through May 30. Invitations and reminders to complete the survey were included in the school announcements on April 11, April 18, April 23, April 25, May 2, May 9, May 16, May 23, May 24, and May 30. A paper flier was also posted at the annual Variety Show asking for participation in the survey.

The teachers' meeting on May 9th had items relating to the LCAP, including invitation to join the LCAP Focus Group and planning for Student Surveys. Teachers also had meetings with the School Director throughout the school year in which input could be given on a 1:1 basis.

On February 1, March 7, April 4, May 2 and June 6 Coffee with the Director meetings were held for parents to dialogue with the School Director. 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.

Although these promotion efforts were nearly the same as years' past, we have had a lower number of respondents for our survey so far with just 22 respondents, past years typically saw 30-40 respondents.

# Goals and Actions

## Goal

| Goal # | Description | Type of Goal |
|---|---|---|
| 1 | Provide an equitable learning environment with high quality, authentic Montessori instruction, curriculum aligned to Common Core State Standards, a broad range of traditional Montessori materials, highly-qualified teachers, and a facility in good repair.<br><br>1.1: Provide highly qualified teachers for all students.<br>1.2: Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS).<br>1.3: Provide a broad range of Montessori materials.<br>1.4: Provide a facility in good repair and maintain recess equipment.<br>1.5: Refine Student Success Team (SST) process to give access to students whose achievement may otherwise be hindered by learning differences due to disabilities, marginal past academic experiences, or behavior issues. | Maintenance of Progress Goal |

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 2: State Standards (Conditions of Learning)
Priority 3: Parental Involvement (Engagement)
Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

This was originally a Broad Goal to cover 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.
Good progress has been made on these and we are now classifying it as a whole as a maintenance of progress goal.

# Measuring and Reporting Results

| Metric # | Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|---|
| 1.1 | Personnel files/teachers' credentials | 100% highly qualified credentialed teachers | | | 100% highly qualified credentialed teachers | |
| 1.2 | CASSPP Scores | TBD | | | 30 points below standard for ELA 50 points below standard for math | |
| 1.3 | Montessori Materials Inventories | Most materials are in good repair, worn or broken materials will be replaced after the end of the fiscal year. | | | All classrooms will have a broad range of materials for the grade levels served. | |
| 1.4 | Facilities Inspection Tool | Repairs request system implemented and facility is being kept up. PE and recess equipment check-out system working and new materials are ordered as old wear our. | | | Facility in good repair; PE and recess equipment check-out system working and new materials are ordered as old wear out. | |
| 1.5 | Local Indicator/School Community Survey | 77% reported satisfied or very satisfied with support given to struggling learners. | | | 80% satisfied or very satisfied with support given struggling learners. | |

# Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

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.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

# Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **1.1** | Provide highly qualified teachers for all students. | All classrooms will have highly qualified teachers. Teachers' credentials will be reviewed each year. | $1,500.00 | No |
| **1.2** | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | Instruction will provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | $33,500.00 | No |
| **1.3** | Provide a broad range of Montessori materials. | Montessori materials are a necessary component of the Montessori classroom. | $3,000.00 | No |

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **1.4** | Provide a facility in good repair and maintain recess equipment. | It is a basic servcie for a school to provide a facility in good repair. Input from the students indicate that they value recess equipment. | $20,000.00 | No |
| **1.5** | SST process | 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. | $40,000.00 | No |

# Goals and Actions

## Goal

| Goal # | Description | Type of Goal |
|---|---|---|
| 2 | Provide a positive school climate with authentic opportunities for parent involvement.<br>2.1 Ensure that parents understand the ways the school communicates with students' families.<br>2.2 Ensure that parents understand the nature of the Montessori method of education.<br>2.3 Improve parent involvement and volunteerism.<br>2.4 Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. | Maintenance of Progress Goal |

State Priorities addressed by this goal.

Priority 3: Parental Involvement (Engagement)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)

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 # | Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|---|
| 2.1 | Local metric/Parent Square | 100% of parents contactable | | | 100% of parents contactable | |
| 2.2 | Local metric/Community Survey Results | 90% of respondents agree or strongly agree that they are satisfied iwith curriculum in terms of Montessori authenticity.<br><br>81% of repondents agree or strongly agree | | | 90% of respondents will agree or strongly agree that they are satisfied iwith curriculum in terms of Montessori authenticity. | |

| Metric # | Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|---|
| | | that they are satisfied with the opportunities to make an impact in academic outcomes for my student/s. | | | 80% of repondents will agree or strongly agree that they are satisfied with the opportunities to make an impact in academic outcomes for my student/s. | |
| 2.3 | Local metric/Parent Volunteer Tracking System | 40% of families reported volunteer huors; 4% of families met or exceeded 30 hours | | | 35% of familieswill report volunteer huors; 5% of families will meet or exceeded 30 hours . | |
| 2.4 | Chronic absenteeism Rate | 35% Chronic Absenteeism Rate | | | 15% Chronic Absenteeism Rate | |
| 2.5 | Decreased or maintained suspension rate | 5.3% Suspension Rate | | | 5% Suspension Rate | |

# Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

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.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

# Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **2.1** | Ensure that parents understand the ways the school communicates with students' families. | Office Manager and teachers will ensure that parents understand how announcements are sent home via the Parent Square Application | $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. | $30,000.00 | No |
| **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. | $5,500.00 | 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. | $15,000.00 | No |

# Goals and Actions

## Goal

| Goal # | Description | Type of Goal |
|---|---|---|
| 3 | Socioeconomically disadvantaged students will have access to free or reduced lunch, free after school tutoring, and free child care before and after school. | Equity Multiplier Focus Goal |

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 2: State Standards (Conditions of Learning)
Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

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 # | Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|---|
| 3.1 | CAASPP Scores and/or growth data | TBD | | | ELA 50 points below standard for low-income students; math 60 points below standard for low-income students and/or show at least one year's growth in ELA and math | |

| Metric # | Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|---|
| 3.2 | CAASPP Scores and/or growth data | TBD | | | ELA 50 points below standard for low-income students; math 60 points below standard for low-income students and/or show at least one year's growth in ELA and math | |
| 3.3 | CAASPP Scores and/or growth data | TBD | | | ELA 50 points below standard for low-income students; math 60 points below standard for low-income students and/or show at least one year's growth in ELA and math | |

# Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

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.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

# 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. | $9,000.00 | Yes |
| **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Students will have access to free tutoring after school as described in our after care program, socioeconomically disadvantaged students will not pay fees to participate. | $35,000.00 | Yes |
| **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school and a summer learning program. | Students from lower income backgrounds will have access to free child care. | $67,000.00 | Yes |

# Goals and Actions

## Goal

| Goal # | Description | Type of Goal |
|---|---|---|
| 4 | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Equity Multiplier Focus Goal |

State Priorities addressed by this goal.

Priority 1: Basic (Conditions of Learning)
Priority 2: State Standards (Conditions of Learning)
Priority 4: Pupil Achievement (Pupil Outcomes)
Priority 5: Pupil Engagement (Engagement)
Priority 6: School Climate (Engagement)
Priority 7: Course Access (Conditions of Learning)
Priority 8: Other Pupil Outcomes (Pupil Outcomes)

An explanation of why the LEA has developed this goal.

## Measuring and Reporting Results

| Metric # | Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|---|
| 4.1 | Local mesures/Community Survey Results & Student Surveys | 77% of students agreed or strongly agreed tha they are happy to be students at the school. Teachers indicate that field trips are important and including all students on field trips, regardless of ability to pay, is important. | | | 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. | |

# Goal Analysis [2023-24]

An analysis of how this goal was carried out in the previous year.

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

Not Applicable.

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.

Not Applicable.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

Not Applicable.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

Not Applicable.

# Actions

| Action # | Title | Description | Total Funds | Contributing |
|---|---|---|---|---|
| **4.1** | Students in low-income will have access to scholarships to attend all field trips. | 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. | $6,000.00 | Yes |

# Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students [2024-25]

| Total Projected LCFF Supplemental and/or Concentration Grants | Projected Additional 15 percent LCFF Concentration Grant |
|---|---|
| $116,992 | $0 |

**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 |
|---|---|---|---|
| 9.380% | 0.000% | $0.00 | 9.380% |

**The Budgeted Expenditures for Actions identified as Contributing may be found in the Contributing Actions Table.**

## Required Descriptions

### *LEA-wide and Schoolwide Actions*

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

| Goal and Action # | Identified Need(s) | How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis | Metric(s) to Monitor Effectiveness |
|---|---|---|---|
| **3.1** | **Action:**<br>Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks.<br><br>**Need:**<br><br>**Scope:** | | |

| Goal and Action # | Identified Need(s) | How the Action(s) Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis | Metric(s) to Monitor Effectiveness |
|---|---|---|---|
| | Schoolwide | | |
| **3.2** | **Action:**<br>Socioeconomically disadvantaged students will have access to free after school tutoring.<br><br>**Need:**<br><br>**Scope:**<br>Schoolwide | | |
| **3.3** | **Action:**<br>Socioeconomically disadvantaged students will have access to free child care before and after school and a summer learning program.<br><br>**Need:**<br><br>**Scope:**<br>Schoolwide | | |
| **4.1** | **Action:**<br>Students in low-income will have access to scholarships to attend all field trips.<br><br>**Need:**<br><br>**Scope:**<br>Schoolwide | | |

## *Limited Actions*

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

| Goal and Action # | Identified Need(s) | How the Action(s) are Designed to Address Need(s) | Metric(s) to Monitor Effectiveness |
|---|---|---|---|

For any limited 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, as applicable.

## *Additional Concentration Grant Funding*

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 | 1:3 | |
| Staff-to-student ratio of certificated staff providing direct services to students | 1:15 | |

# 2024-25 Total Expenditures Table

| LCAP Year | 1. Projected LCFF Base Grant (Input Dollar Amount) | 2. Projected LCFF Supplemental and/or Concentration Grants (Input Dollar Amount) | 3. Projected Percentage to Increase or Improve Services for the Coming School Year (2 divided by 1) | LCFF Carryover — Percentage (Input Percentage from Prior Year) | Total Percentage to Increase or Improve Services for the Coming School Year (3 + Carryover %) |
|---|---|---|---|---|---|
| Totals | 1,247,310 | 116,992 | 9.380% | 0.000% | 9.380% |

| Totals | LCFF Funds | Other State Funds | Local Funds | Federal Funds | Total Funds | Total Personnel | Total Non-personnel |
|---|---|---|---|---|---|---|---|
| Totals | $231,500.00 | $5,000.00 | $10,000.00 | $25,000.00 | $271,500.00 | $151,975.00 | $119,525.00 |

| Goal # | Action # | Action Title | Student Group(s) | Contributing to Increased or Improved Services? | Scope | Unduplicated Student Group(s) | Location | Time Span | Total Personnel | Total Non-personnel | LCFF Funds | Other State Funds | Local Funds | Federal Funds | Total Funds | Planned Percentage of Improved Services |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 1.1 | Provide highly qualified teachers for all students. | All | No | | | All Schools | Week's time in August | $1,500.00 | $0.00 | $1,500.00 | | | | $1,500.00 | |
| 1 | 1.2 | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | All | No | | | | All school year | $0.00 | $33,500.00 | $33,500.00 | | | | $33,500.00 | |
| 1 | 1.3 | Provide a broad range of Montessori materials. | All | No | | | | First three months of school | $0.00 | $3,000.00 | $3,000.00 | | | | $3,000.00 | |
| 1 | 1.4 | Provide a facility in good repair and maintain recess equipment. | All | No | | | | Ongoing | $0.00 | $20,000.00 | $10,000.00 | | $10,000.00 | | $20,000.00 | |
| 1 | 1.5 | SST process | All Students with Disabilities | No | | | | Ongoing throughout the school year. | $0.00 | $40,000.00 | $10,000.00 | $5,000.00 | | $25,000.00 | $40,000.00 | |
| 2 | 2.1 | Ensure that parents understand the ways the school communicates with students' families. | All | No | | | | By October conferences and ongoing as new families enroll | $2,975.00 | $3,025.00 | $6,000.00 | | | | $6,000.00 | |
| 2 | 2.2 | Ensure that parents understand the nature of the Montessori method of education. | All | No | | | | Throughout the year at various school functions, including Back to School Night, Parent Education Events, conferences, Open House, and | $25,000.00 | $5,000.00 | $30,000.00 | | | | $30,000.00 | |

| Goal # | Action # | Action Title | Student Group(s) | Contributing to Increased or Improved Services? | Scope | Unduplicated Student Group(s) | Location | Time Span | Total Personnel | Total Non-personnel | LCFF Funds | Other State Funds | Local Funds | Federal Funds | Total Funds | Planned Percentage of Improved Services |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | school tours | | | | | | | | |
| 2 | 2.3 | Improve parent involvement and volunteerism. | All | No | | | | Volunteer opportunitites are available all school year long. | $5,500.00 | $0.00 | $5,500.00 | | | | $5,500.00 | |
| 2 | 2.4 | Increase attendance for all students and all subgroups and decrease chronic absenteeism and suspension rates. | All | No | | | | Ongoing throughout the year, attendance meetings at least once every two weeks | $15,000.00 | $0.00 | $15,000.00 | | | | $15,000.00 | |
| 3 | 3.1 | Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks. | Low Income | Yes | School wide | Low Income | | Each school day throughout the year. | $9,000.00 | $0.00 | $9,000.00 | | | | $9,000.00 | 1.38% |
| 3 | 3.2 | Socioeconomically disadvantaged students will have access to free after school tutoring. | Low Income | Yes | School wide | Low Income | | Each school day throughout the year. | $30,000.00 | $5,000.00 | $35,000.00 | | | | $35,000.00 | 2% |
| 3 | 3.3 | Socioeconomically disadvantaged students will have access to free child care before and after school and a summer learning program. | Low Income | Yes | School wide | Low Income | | Each day of school throughout the year. | $62,000.00 | $5,000.00 | $67,000.00 | | | | $67,000.00 | 5% |
| 4 | 4.1 | Students in low-income will have access to scholarships to attend all field trips. | Low Income | Yes | School wide | Low Income | | Throughout the year | $1,000.00 | $5,000.00 | $6,000.00 | | | | $6,000.00 | 1% |

# 2024-25 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 |
|---|---|---|---|---|---|---|---|---|---|
| 1,247,310 | 116,992 | 9.380% | 0.000% | 9.380% | $117,000.00 | 9.380% | 18.760 % | **Total:** | $117,000.00 |
| | | | | | | | | **LEA-wide Total:** | $0.00 |
| | | | | | | | | **Limited Total:** | $0.00 |
| | | | | | | | | **Schoolwide Total:** | $117,000.00 |

| 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 | Schoolwide | Low Income | | $9,000.00 | 1.38% |
| **3** | **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Yes | Schoolwide | Low Income | | $35,000.00 | 2% |
| **3** | **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school and a summer learning program. | Yes | Schoolwide | Low Income | | $67,000.00 | 5% |
| **4** | **4.1** | Students in low-income will have access to scholarships to attend all field trips. | Yes | Schoolwide | Low Income | | $6,000.00 | 1% |

# 2023-24 Annual Update Table

| Totals | Last Year's Total Planned Expenditures (Total Funds) | Total Estimated Expenditures (Total Funds) |
|---|---|---|
| **Totals** | $277,719.00 | $274,393.00 |

| 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 | $1,575.00 | 2,000 |
| **1** | **1.2** | Provide authentic Montessori instruction with curriculum aligned to Common Core State Standards (CCSS). | No | $33,382.00 | 33,534 |
| **1** | **1.3** | Provide a broad range of Montessori materials. | No | $3,009.00 | 3,244 |
| **1** | **1.4** | Provide a facility in good repair and maintain recess equipment. | No | $19,588.00 | 24,458 |
| **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 | $11,119.00 | 12,000 |
| **2** | **2.1** | Ensure that parents understand the ways the school communicates with students' families. | No | $6,000.00 | 5,000 |
| **2** | **2.2** | Ensure that parents understand the nature of the Montessori method of education. | No | $31,259.00 | 24,144 |
| **2** | **2.3** | Improve parent involvement and volunteerism. | No | $5,038.00 | 5,000 |
| **2** | **2.4** | Increase attendance for all students and all subgroups and decrease | No | $15,384.00 | 12,886 |

| 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) |
|---|---|---|---|---|---|
| | | chronic absenteeism and suspension rates. | | | |
| **3** | **3.1** | Socioeconomically disadvantaged students will have access to free or reduced lunch and healthy snacks. | Yes | $8,713.00 | 9,664 |
| **3** | **3.2** | Socioeconomically disadvantaged students will have access to free after school tutoring. | Yes | $69,050.00 | 63,000 |
| **3** | **3.3** | Socioeconomically disadvantaged students will have access to free child care before and after school. | Yes | $69,050.00 | 74,000 |
| **4** | **4.1** | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Yes | $4,552.00 | 5,463 |

# 2023-24 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) |
|---|---|---|---|---|---|---|
| 124,194 | $151,365.00 | $152,127.00 | ($762.00) | 17.870% | 18.000% | 0.130% |

| 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 | 8,713 | 9,664 | 3% | 3% |
| 3 | 3.2 | Socioeconomically disadvantaged students will have access to free after school tutoring. | Yes | 69,050 | 63,000 | 3% | 3% |
| 3 | 3.3 | Socioeconomically disadvantaged students will have access to free child care before and after school. | Yes | 69,050 | 74,000 | 8% | 8% |
| 4 | 4.1 | Socioeconomically disadvantaged students will have access to scholarships to attend field trips. | Yes | $4,552.00 | 5,463 | 3.87% | 4% |

# 2023-24 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) |
|---|---|---|---|---|---|---|---|---|
| 1,048,533 | 124,194 | -.13 | 11.715% | $152,127.00 | 18.000% | 32.509% | $0.00 | 0.000% |

# Local Control and Accountability Plan 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, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (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 the nature of some LCAP template sections 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, including long-term 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]).

        - **NOTE:** As specified in *EC* Section 62064(b)(1), the LCAP must provide a description of the annual goals, for all pupils and each subgroup of pupils identified pursuant to *EC* Section 52052, to be achieved for each of the state priorities. Beginning in 2023–24, *EC*

Section 52052 identifies long-term English learners as a separate and distinct pupil subgroup with a numerical significance at 15 students.

- Annually reviewing and updating the LCAP to reflect progress toward the goals (*EC* Section 52064[b][7]).
- Ensuring that all increases attributable to supplemental and concentration grant calculations, including concentration grant add-on funding and/or LCFF carryover, are reflected in the LCAP (*EC* sections 52064[b][6], [8], and [11]).

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 must: (a) reflect comprehensive strategic planning, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the California School Dashboard (Dashboard), (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 2024–25, 2025–26, and 2026–27 school years reflects statutory changes made through Senate Bill 114 (Committee on Budget and Fiscal Review), Chapter 48, Statutes of 2023.

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 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 which, based on research, experience, and input gathered from educational partners, the LEA believes 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 document. Additionally, the beginning of each template section includes information emphasizing the purpose that 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 present a meaningful context for the rest of the LCAP, the content of this section should be clearly and meaningfully related to the content included throughout each subsequent section of the LCAP.

## Requirements and Instructions

**General Information**

A description of the LEA, its schools, and its students in grades transitional kindergarten–12, as applicable to the LEA.

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, employment, the number and size of specific schools, recent community challenges, and other such information the LEA may wish to include can enable a reader to more fully understand the LEA's LCAP.
- As part of this response, identify all schools within the LEA receiving Equity Multiplier funding.

**Reflections: Annual Performance**

A reflection on annual performance based on a review of the California School Dashboard (Dashboard) and local data.

Reflect on the LEA's annual performance on the Dashboard and local data. This may include both successes and challenges identified by the LEA during the development process.

LEAs are encouraged to highlight how they are addressing the identified needs of student groups, and/or schools within the LCAP as part of this response.

As part of this response, the LEA must identify the following, which will remain unchanged during the three-year LCAP cycle:

- Any school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard;
- Any student group within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard; and/or
- Any student group within a school within the LEA that received the lowest performance level on one or more state indicators on the 2023 Dashboard.

**Reflections: Technical Assistance**

As applicable, a summary of the work underway as part of technical assistance.

Annually identify the reason(s) the LEA is eligible for or has requested technical assistance consistent with *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, and provide a summary of the work underway as part of receiving technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance, however this also includes LEAs that have requested technical assistance from their COE.

- If the LEA is not eligible for or receiving technical assistance, the LEA may respond to this prompt as "Not Applicable."

**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

A list of the schools in the LEA that are eligible for comprehensive support and improvement.

- Identify the schools within the LEA that have been identified for CSI.

### Support for Identified Schools

A description of how the LEA has or will support its eligible schools in developing comprehensive support and improvement plans.

- 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

A description of how the LEA will monitor and evaluate the plan to support student and school improvement.

- 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, particularly to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard, 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 to 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.

## Requirements

**School districts and COEs:** *EC* sections 52060(g) (California Legislative Information) and 52066(g) (California Legislative Information) specify the educational partners that must be consulted when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Local bargaining units of the LEA,
- Parents, and
- Students

A school district or COE receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

Before adopting the LCAP, school districts and COEs must share it with the applicable committees, as identified below under Requirements and Instructions. 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.

**Charter schools:** *EC* Section 47606.5(d) (California Legislative Information) requires that the following educational partners be consulted with when developing the LCAP:

- Teachers,
- Principals,
- Administrators,
- Other school personnel,
- Parents, and
- Students

A charter school receiving Equity Multiplier funds must also consult with educational partners at the school generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for the school.

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. 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 CDE's LCAP webpage.

Before the governing board/body of an LEA considers the adoption of the LCAP, the LEA must meet the following legal requirements:

- For school districts, see Education Code Section 52062 (California Legislative Information);
    - **Note:** Charter schools using the LCAP as the School Plan for Student Achievement must meet the requirements of *EC* Section 52062(a).

- For COEs, see Education Code Section 52068 (California Legislative Information); and
- For charter schools, see Education Code Section 47606.5 (California Legislative Information).
- **NOTE:** As a reminder, the superintendent of a school district or COE must respond, in writing, to comments received by the applicable committees identified in the *Education Code* sections listed above. This includes the parent advisory committee and may include the English learner parent advisory committee and, as of July 1, 2024, the student advisory committee, as applicable.

# Instructions

**Respond to the prompts as follows:**

A summary of the process used to engage educational partners in the development of the LCAP.

School districts and county offices of education must, at a minimum, consult with teachers, principals, administrators, other school personnel, local bargaining units, parents, and students in the development of the LCAP.

Charter schools must, at a minimum, consult with teachers, principals, administrators, other school personnel, parents, and students in the development of the LCAP.

An LEA receiving Equity Multiplier funds must also consult with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

**Complete the table as follows:**

Educational Partners

Identify the applicable educational partner(s) or group(s) that were engaged in the development of the LCAP.

Process for Engagement

Describe the engagement process used by the LEA to involve the identified educational partner(s) in the development of the LCAP. At a minimum, the LEA must describe how it 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.
- An LEA receiving Equity Multiplier funds must also include a summary of how it consulted with educational partners at schools generating Equity Multiplier funds in the development of the LCAP, specifically, in the development of the required focus goal for each applicable school.

A description of how the adopted LCAP was influenced by the feedback provided by educational partners.

Describe any goals, metrics, actions, or budgeted expenditures in the LCAP that were influenced by or developed in response to the educational partner feedback.

- 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. 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.

- An LEA receiving Equity Multiplier funds must include a description of how the consultation with educational partners at schools generating Equity Multiplier funds influenced the development of the adopted LCAP.

- For the purposes of this prompt, this may also include, but is 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 target 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 students
    - Analysis of effectiveness of the specific actions to achieve the goal
    - Analysis of material differences in expenditures
    - Analysis of changes made to a goal for the ensuing LCAP year based on the annual update process
    - Analysis 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 must 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 must 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. As previously stated, 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, and to address and reduce disparities in opportunities and outcomes between student groups indicated by the Dashboard.

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.
    - All Equity Multiplier goals must be developed as focus goals. For additional information, see Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding below.
- 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.

**Requirement to Address the LCFF State Priorities**

At a minimum, the LCAP must address all LCFF priorities and associated metrics articulated in *EC* sections 52060(d) and 52066(d), as applicable to the LEA. The LCFF State Priorities Summary provides a summary of *EC* sections 52060(d) and 52066(d) to aid in the development of the LCAP.

Respond to the following prompts, as applicable:

**Focus Goal(s)**

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.

Type of Goal

Identify the type of goal being implemented as a Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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.

**Required Focus Goal(s) for LEAs Receiving Equity Multiplier Funding**

Description

LEAs receiving Equity Multiplier funding must include one or more focus goals for each school generating Equity Multiplier funding. In addition to addressing the focus goal requirements described above, LEAs must adhere to the following requirements.

Focus goals for Equity Multiplier schoolsites must address the following:

(A) All student groups that have the lowest performance level on one or more state indicators on the Dashboard, and

(B) Any underlying issues in the credentialing, subject matter preparation, and retention of the school's educators, if applicable.

- Focus Goals for each and every Equity Multiplier schoolsite must identify specific metrics for each identified student group, as applicable.
- An LEA may create a single goal for multiple Equity Multiplier schoolsites if those schoolsites have the same student group(s) performing at the lowest performance level on one or more state indicators on the Dashboard or, experience similar issues in the credentialing, subject matter preparation, and retention of the school's educators.
    - When creating a single goal for multiple Equity Multiplier schoolsites, the goal must identify the student groups and the performance levels on the Dashboard that the Focus Goal is addressing; or,
    - The common issues the schoolsites are experiencing in credentialing, subject matter preparation, and retention of the school's educators, if applicable.

Type of Goal

Identify the type of goal being implemented as an Equity Multiplier Focus Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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.
- In addition to this information, the LEA must also identify:
    - The school or schools to which the goal applies

LEAs are encouraged to approach an Equity Multiplier goal from a wholistic standpoint, considering how the goal might maximize student outcomes through the use of LCFF and other funding in addition to Equity Multiplier funds.

- Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the Expanded Learning Opportunities Program (ELO-P), the Literacy Coaches and Reading Specialists (LCRS) Grant Program, and/or the California Community Schools Partnership Program (CCSPP).
- This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

**Note:** *EC* Section 42238.024(b)(1) (California Legislative Information) requires that Equity Multiplier funds be used for the provision of evidence-based services and supports for students. Evidence-based services and supports are based on objective evidence that has informed the design of the service or support and/or guides the modification of those services and supports. Evidence-based supports and strategies are most commonly based on educational research and/or metrics of LEA, school, and/or student performance.

**Broad 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.

Type of Goal

Identify the type of goal being implemented as a Broad Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An 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**

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.

Type of Goal

Identify the type of goal being implemented as a Maintenance of Progress Goal.

State Priorities addressed by this goal.

Identify each of the state priorities that this goal is intended to address.

An explanation of why the LEA has developed this goal.

Explain how the actions will sustain the progress exemplified by the related metrics.

**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 must identify metrics for specific student groups, as appropriate, including expected outcomes that address and reduce disparities in outcomes between student groups.
- 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 local indicator self-reflection tools within the Dashboard.

- **Required metrics for LEA-wide actions:** For each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.
    - These required metrics may be identified within the action description or the first prompt in the increased or improved services section, however the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.
- **Required metrics for Equity Multiplier goals**: For each Equity Multiplier goal, the LEA must identify:
    - The specific metrics for each identified student group at each specific schoolsite, as applicable, to measure the progress toward the goal, and/or
    - The specific metrics used to measure progress in meeting the goal related to credentialing, subject matter preparation, or educator retention at each specific schoolsite.

Complete the table as follows:

### Metric #

- Enter the metric number.

### Metric

- Identify the standard of measure being used to determine progress towards the goal and/or to measure the effectiveness of one or more actions associated with the goal.

### Baseline

- Enter the baseline when completing the LCAP for 2024–25.
    - Use the most recent data associated with the 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 2023 Dashboard for the baseline of a metric only if that data represents the most recent available data (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.
    - Indicate the school year to which the baseline data applies.
    - The baseline data must remain unchanged throughout the three-year LCAP.
        - This requirement is not intended to prevent LEAs from revising the baseline data if it is necessary to do so. For example, if an LEA identifies that its data collection practices for a particular metric are leading to inaccurate data and revises its practice to obtain

accurate data, it would also be appropriate for the LEA to revise the baseline data to align with the more accurate data process and report its results using the accurate data.

- If an LEA chooses to revise its baseline data, then, at a minimum, it must clearly identify the change as part of its response to the description of changes prompt in the Goal Analysis for the goal. LEAs are also strongly encouraged to involve their educational partners in the decision of whether or not to revise a baseline and to communicate the proposed change to their educational partners.

- Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a new baseline each year, as applicable.

## Year 1 Outcome

- When completing the LCAP for 2025–26, enter the most recent data available. Indicate the school year to which the data applies.
    - Note for Charter Schools: Charter schools developing a one-year LCAP may provide the Year 1 Outcome when completing the LCAP for both 2025–26 and 2026–27 or may provide the Year 1 Outcome for 2025–26 and provide the Year 2 Outcome for 2026–27.

## Year 2 Outcome

- When completing the LCAP for 2026–27, enter the most recent data available. Indicate the school year to which the data applies.
    - Note for Charter Schools: Charter schools developing a one-year LCAP may identify the Year 2 Outcome as not applicable when completing the LCAP for 2026–27 or may provide the Year 2 Outcome for 2026–27.

## Target for Year 3 Outcome

- When completing the first year of the LCAP, enter the target outcome for the relevant metric the LEA expects to achieve by the end of the three-year LCAP cycle.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP may identify a Target for Year 1 or Target for Year 2, as applicable.

## Current Difference from Baseline

- When completing the LCAP for 2025–26 and 2026–27, enter the current difference between the baseline and the yearly outcome, as applicable.
    - Note for Charter Schools: Charter schools developing a one- or two-year LCAP will identify the current difference between the baseline and the yearly outcome for Year 1 and/or the current difference between the baseline and the yearly outcome for Year 2, as applicable.

Timeline for school districts and COEs for completing the "**Measuring and Reporting Results**" part of the Goal.

| Metric | Baseline | Year 1 Outcome | Year 2 Outcome | Target for Year 3 Outcome | Current Difference from Baseline |
|---|---|---|---|---|---|
| Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric. | Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric. | Enter information in this box when completing the LCAP for **2025–26**. Leave blank until then. | Enter information in this box when completing the LCAP for **2026–27**. Leave blank until then. | Enter information in this box when completing the LCAP for **2024–25** or when adding a new metric. | Enter information in this box when completing the LCAP for **2025–26** and **2026–27**. Leave blank until then. |

**Goal Analysis:**

Enter the LCAP Year.

Using actual annual measurable outcome data, including data from the Dashboard, analyze whether the planned actions were effective towards achieving the goal. "Effective" means the degree to which the planned actions were successful in producing the target result. Respond to the prompts as instructed.

**Note:** When completing the 2024–25 LCAP, use the 2023–24 Local Control and Accountability Plan Annual Update template to complete the Goal Analysis and identify the Goal Analysis prompts in the 2024–25 LCAP as "Not Applicable."

A description of overall implementation, including any substantive differences in planned actions and actual implementation of these actions, and any relevant challenges and successes experienced with implementation.

- Describe the overall implementation of the actions to achieve the articulated goal, including relevant challenges and successes experienced with implementation.
    - Include a discussion of relevant challenges and successes experienced with the implementation process.
    - This discussion 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.

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.

- 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.

A description of the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal.

- Describe the effectiveness or ineffectiveness of the specific actions to date in making progress toward the goal. “Effectiveness” means the degree to which the actions were successful in producing the target result and “ineffectiveness” means that the actions did not produce any significant or targeted result.
    - 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.
    - Beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period.

A description of any changes made to the planned goal, metrics, target outcomes, or actions for the coming year that resulted from reflections on prior practice.

- 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.
    - As noted above, beginning with the development of the 2024–25 LCAP, the LEA must change actions that have not proven effective over a three-year period. For actions that have been identified as ineffective, the LEA must identify the ineffective action and must include a description of the following:
        - The reasons for the ineffectiveness, and
        - How changes to the action will result in a new or strengthened approach.

**Actions:**
Complete the table as follows. Add additional rows as necessary.

Action #

- Enter the action number.

Title

- Provide a short title for the action. This title will also appear in the action tables.

Description

- Provide a brief description of the action.

- For actions that contribute to meeting the increased or improved services requirement, the LEA may include an explanation of how each action is principally directed towards and effective in meeting the LEA's goals for unduplicated students, as described in the instructions for the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

- As previously noted, for each action identified as 1) contributing towards the requirement to increase or improve services for foster youth, English learners, including long-term English learners, and low-income students and 2) being provided on an LEA-wide basis, the LEA must identify one or more metrics to monitor the effectiveness of the action and its budgeted expenditures.

- These required metrics may be identified within the action description or the first prompt in the increased or improved services section; however, the description must clearly identify the metric(s) being used to monitor the effectiveness of the action and the action(s) that the metric(s) apply to.

### Total Funds

- Enter the total amount of expenditures associated with this action. Budgeted expenditures from specific fund sources will be provided in the action tables.

### Contributing

- Indicate whether the action contributes to meeting the increased 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 contributing action, the LEA will need to provide additional information in the Increased or Improved Services section to address the requirements in *California Code of Regulations*, Title 5 [5 *CCR*] Section 15496 in the Increased or Improved Services section of the LCAP.

***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.

**Required Actions**

- LEAs with 30 or more English learners and/or 15 or more long-term English learners must include specific actions in the LCAP related to, at a minimum:

    - Language acquisition programs, as defined in *EC* Section 306, provided to students, and

    - Professional development for teachers.

    - If an LEA has both 30 or more English learners and 15 or more long-term English learners, the LEA must include actions for both English learners and long-term English learners.

- LEAs eligible for technical assistance pursuant to *EC* sections 47607.3, 52071, 52071.5, 52072, or 52072.5, must include specific actions within the LCAP related to its implementation of the work underway as part of technical assistance. The most common form of this technical assistance is frequently referred to as Differentiated Assistance.

- LEAs that have Red Dashboard indicators for (1) a school within the LEA, (2) a student group within the LEA, and/or (3) a student group within any school within the LEA must include one or more specific actions within the LCAP:
    - The specific action(s) must be directed towards the identified student group(s) and/or school(s) and must address the identified state indicator(s) for which the student group or school received the lowest performance level on the 2023 Dashboard. Each student group and/or school that receives the lowest performance level on the 2023 Dashboard must be addressed by one or more actions.
    - These required actions will be effective for the three-year LCAP cycle.

# 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 as defined in *EC* Section 42238.02 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.

Please Note: For the purpose of meeting the Increased or Improved Services requirement and consistent with *EC* Section 42238.02, long-term English learners are included in the English learner student group.

**Statutory Requirements**

An LEA is required to demonstrate in its LCAP how it is increasing or improving services for its students who are foster youth, English learners, and/or low-income, collectively referred to as unduplicated students, as compared to the services provided to all students in proportion to the increase in funding it receives based on the number and concentration of unduplicated students in the LEA (*EC* Section 42238.07[a][1], *EC* Section 52064[b][8][B]; 5 *CCR* Section 15496[a]). This proportionality percentage is also known as the "minimum proportionality percentage" or "MPP." The manner in which an LEA demonstrates it is meeting its MPP is two-fold: (1) through the expenditure of LCFF funds or through the identification of a Planned Percentage of Improved Services as documented in the Contributing Actions Table, and (2) through the explanations provided in the Increased or Improved Services for Foster Youth, English Learners, and Low-Income Students section.

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 identified in the Goals and Actions section as contributing to the increased or improved services requirement, whether they are provided across the entire LEA (LEA-wide action), provided to an entire school (Schoolwide action), or solely provided to one or more unduplicated student group(s) (Limited action).

Therefore, for *any* action contributing to meet the increased or improved services requirement, the LEA must include an explanation of:

- How the action is increasing or improving services for the unduplicated student group(s) (Identified Needs and Action Design), and
- How the action meets the LEA's goals for its unduplicated pupils in the state and any local priority areas (Measurement of Effectiveness).

**LEA-wide and Schoolwide Actions**
In addition to the above required explanations, LEAs must provide a justification for why an LEA-wide or Schoolwide action is being provided to all students and how the action is intended to improve outcomes for unduplicated student group(s) as compared to all 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 increased or improved services standard because enrolling students is not the same as serving students.

**For School Districts Only**
Actions provided on an **LEA-wide** basis at **school districts with an unduplicated pupil percentage of less than 55 percent** must also include a description of how the actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

Actions provided on a **Schoolwide** basis for **schools with less than 40 percent enrollment of unduplicated pupils** must also include a description of how these actions are the most effective use of the funds to meet the district's goals for its unduplicated pupils in the state and any local priority areas. The description must provide the basis for this determination, including any alternatives considered, supporting research, experience, or educational theory.

# Requirements and Instructions

Complete the tables as follows:

### Total 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 foster youth, English learner, and low-income students. This amount includes the Additional 15 percent LCFF Concentration Grant.

### Projected Additional 15 percent LCFF Concentration Grant

- 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 LEA's 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:

**LEA-wide and Schoolwide Actions**

For each action being provided to an entire LEA or school, provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) for whom the action is principally directed, (2) how the action is designed to address the identified need(s) and why it is being provided on an LEA or schoolwide basis, and (3) the metric(s) used to measure the effectiveness of the action in improving outcomes for the unduplicated student group(s).

If the LEA has provided this required description in the Action Descriptions, state as such within the table.

Complete the table as follows:

**Identified Need(s)**

Provide an explanation of the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed.

An LEA demonstrates how an action is principally directed towards an unduplicated student group(s) when the LEA explains the need(s), condition(s), or circumstance(s) of the unduplicated student group(s) identified through a needs assessment and how the action addresses them. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

**How the Action(s) are Designed to Address Need(s) and Why it is Provided on an LEA-wide or Schoolwide Basis**

Provide an explanation of how the action as designed will address the unique identified need(s) of the LEA's unduplicated student group(s) for whom the action is principally directed and the rationale for why the action is being provided on an LEA-wide or schoolwide basis.

- As stated above, 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 increased or improved services standard because enrolling students is not the same as serving students.

**Metric(s) to Monitor Effectiveness**

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

**Note for COEs and Charter Schools**: In the case of COEs and charter schools, schoolwide and LEA-wide are considered to be synonymous.

**Limited Actions**

For each action being solely provided to one or more unduplicated student group(s), provide an explanation of (1) the unique identified need(s) of the unduplicated student group(s) being served, (2) how the action is designed to address the identified need(s), and (3) how the effectiveness of the action in improving outcomes for the unduplicated student group(s) will be measured.

If the LEA has provided the required descriptions in the Action Descriptions, state as such.

Complete the table as follows:

**Identified Need(s)**

Provide an explanation of the unique need(s) of the unduplicated student group(s) being served identified through the LEA's needs assessment. A meaningful needs assessment includes, at a minimum, analysis of applicable student achievement data and educational partner feedback.

**How the Action(s) are Designed to Address Need(s)**

Provide an explanation of how the action is designed to address the unique identified need(s) of the unduplicated student group(s) being served.

**Metric(s) to Monitor Effectiveness**

Identify the metric(s) being used to measure the progress and effectiveness of the action(s).

For any limited 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, as applicable.

- For each action with an identified Planned Percentage of Improved Services, identify the goal and action number and describe the methodology that was used.

- 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, based on the LEA's current pay scale, 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 Total Planned Expenditures Table and then convert the quotient to a percentage. This percentage is the Planned Percentage of Improved Services for the action.

**Additional Concentration Grant Funding**

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 a single-school LEA or 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 Total Planned Expenditures 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 Total Planned Expenditures Table, the Annual Update Table, the Contributing Actions Annual Update Table, and the LCFF Carryover 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 2024–25 LCAP, 2024–25 will be the coming LCAP Year and 2023–24 will be the current LCAP Year.

# Total Planned Expenditures Table

In the Total Planned Expenditures 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 estimated LCFF entitlement for the coming school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 *CCR* Section 15496(a)(8).

Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs.

See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **2. Projected LCFF Supplemental and/or Concentration Grants:** Provide the total amount of LCFF supplemental and concentration grants estimated 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 requirement; OR, type "No" if the action is **not** included as contributing to meeting the increased or improved services requirement.

- 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.

  - **Note:** Equity Multiplier funds must be included in the "Other State Funds" category, not in the "LCFF Funds" category. As a reminder, Equity Multiplier funds must be used to supplement, not supplant, funding provided to Equity Multiplier schoolsites for purposes of the LCFF, the ELO-P, the LCRS, and/or the CCSPP. This means that Equity Multiplier funds must not be used to replace funding that an Equity Multiplier schoolsite would otherwise receive to implement LEA-wide actions identified in the LEA's LCAP or that an Equity Multiplier schoolsite would otherwise receive to implement provisions of the ELO-P, the LCRS, and/or the CCSPP.

- **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, based on the LEA's current pay scale, 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 Services 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 estimated based on 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 estimated LCFF Target Entitlement for the current school year, excluding the supplemental and concentration grants and the add-ons for the Targeted Instructional Improvement Block Grant program, the former Home-to-School Transportation program, and the Small School District Transportation program, pursuant to 5 *CCR* Section 15496(a)(8). Note that the LCFF Base Grant for purposes of the LCAP also includes the Necessary Small Schools and Economic Recovery Target allowances for school districts, and County Operations Grant for COEs. See *EC* sections 2574 (for COEs) and 42238.02 (for school districts and charter schools), as applicable, for LCFF entitlement calculations.

- **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 plus 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
November 2023

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Local Indicators**

**Date:** June 19, 2024

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**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 2024-2025 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 template shows data that will be uploaded to the CDE's website.

**ACTION REQUESTED:** Approve Local Indicators Self-Reflection

Attachment: Local Indicator Self-Reflection

# 2024-25 Local Performance Indicator Self-Reflection

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

# Introduction

The California State Board of Education (SBE) approved standards for the local indicators that support a local educational agency (LEA) in measuring and reporting progress within the appropriate priority area.

This template is intended as a drafting tool and based on the Local Performance Indicator Quick Guide published by CDE in January 2024.

# Performance Standards

The approved performance standards require an LEA to:

- Annually measure its progress in meeting the requirements of the specific Local Control Funding Formula (LCFF) priority.
- Report the results as part of a non-consent item at the same public meeting of the local governing board/body at which the Local Control and Accountability Plan (LCAP) is adopted.
- Report results to the public through the Dashboard utilizing the SBE-adopted self-reflection tools for each local indicator.

This Quick Guide identifies the approved standards and self-reflection tools that an LEA will use to report its progress on the local indicators.

# Local Indicators

The local indicators address the following state priority areas:

## Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home

- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).

Note: LEAs are required to report the following to their local governing board/body in conjunction with the adoption of the LCAP:

- The LEA’s Teacher Assignment Monitoring and Outcome data available at https://www.cde.ca.gov/ds/ad/tamo.asp.

- The number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home, and

- The number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

## Implementation of State Academic Standards (LCFF Priority 2)

The LEA annually measures its progress implementing state academic standards; the LEA then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

## Parent and Family Engagement (LCFF Priority 3)

This measure addresses Parent and Family Engagement, including how an LEA builds relationships between school staff and families, builds partnerships for student outcomes and seeks input for decision-making.

LEAs report progress of how they have sought input from parents in decision-making and promoted parent participation in programs to its local governing board or body using the SBE-adopted self-reflection tool for Priority 3 at the same public meeting at which the LEA adopts its LCAP, and reports to educational partners and the public through the Dashboard.

## School Climate (LCFF Priority 6)

The LEA administers an annual local climate survey that captures a valid measure of student perceptions of school safety and connectedness, in at least one grade within each grade span(s) the LEA serves (e.g., TK-5, 6-8, 9-12), and reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and to educational partners and the public through the Dashboard.

## Access to a Broad Course of Study (LCFF Priority 7)

The LEA annually measures its progress in the extent to which students have access to, and are enrolled in, a broad course of study that includes the adopted courses of study specified in the California Education Code (EC) for Grades 1-6 and Grades 7-12, as applicable, including the programs and services developed and provided to unduplicated students and individuals with exceptional needs; the LEA then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

## Coordination of Services for Expelled Students – County Office of Education (COE) Only (LCFF Priority 9)

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

## Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)

The COE annually measures its progress in coordinating services for foster youth; the COE then reports the results to its local governing board/body at the same public meeting at which the LCAP is adopted and reports to educational partners and the public through the Dashboard.

# Self-Reflection Tools

An LEA uses the self-reflection tools included within the Dashboard to report its progress on the local performance indicator to educational partners and the public.

The self-reflection tools are embedded in the web-based Dashboard system and are also available in Word document format. In addition to using the self-reflection tools to report its progress on the local performance indicators to educational partners and the public, an LEA may use the self-reflection tools as a resource when reporting results to its local governing board. The approved self-reflection tools are provided below.

## Appropriately Assigned Teachers, Access to Curriculum-Aligned Instructional Materials, and Safe, Clean and Functional School Facilities (LCFF Priority 1)

LEAs will provide the information below:

- Number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home
- Number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

Note: The requested information are all data elements that are currently required as part of the School Accountability Report Card (SARC).

Note: LEAs are required to report the following to their local governing board/body in conjunction with the adoption of the LCAP:

- The LEA’s Teacher Assignment Monitoring and Outcome data available at https://www.cde.ca.gov/ds/ad/tamo.asp.
- The number/percentage of students without access to their own copies of standards-aligned instructional materials for use at school and at home, and
- The number of identified instances where facilities do not meet the “good repair” standard (including deficiencies and extreme deficiencies)

| Academic Year | Total Teaching FTE | Clear | Out-of-Field | Intern | Ineffective | Incomplete | Unknown | N/A |
|---|---|---|---|---|---|---|---|---|
| 2023-2024 | 9 | 4 | 0 | 1 | 0 | 0 | 0 | 0 |

| Access to Instructional Materials | Number | Percent |
|---|---|---|
| Students Without Access to Own Copies of Standards-Aligned Instructional Materials for Use at School and at Home | 0 | 0 |

| Facility Conditions | Number |
|---|---|
| Identified Instances Where Facilities Do Not Meet The “Good Repair” Standard (Including Deficiencies and Extreme Deficiencies) | 0 |

## Implementation of State Academic Standards (LCFF Priority 2)

LEAs may provide a narrative summary of their progress in the implementation of state academic standards based on locally selected measures or tools (Option 1). Alternatively, LEAs may complete the optional reflection tool (Option 2).

**OPTION 1: Narrative Summary (Limited to 3,000 characters)**
In the narrative box provided on the Dashboard, identify the locally selected measures or tools that the LEA is using to track its progress in implementing the state academic standards adopted by the state board and briefly describe why the LEA chose the selected measures or tools.

Additionally, summarize the LEA's progress in implementing the academic standards adopted by the SBE, based on the locally selected measures or tools. The adopted academic standards are:

- English Language Arts (ELA) – Common Core State Standards for ELA
- English Language Development (ELD) (Aligned to Common Core State Standards for ELA)
- Mathematics – Common Core State Standards for Mathematics
- Next Generation Science Standards
- History-Social Science
- Career Technical Education
- Health Education Content Standards
- Physical Education Model Content Standards
- Visual and Performing Arts
- World Language

## Implementation of State Academic Standards (LCFF Priority 2)

**OPTION 2: Reflection Tool**

**Recently Adopted Academic Standards and/or Curriculum Frameworks**

1. **Rate the LEA's progress in providing professional learning for teaching to the recently adopted academic standards and/or curriculum frameworks identified below.**

   Rating Scale (lowest to highest):
   1 - Exploration and Research Phase
   2 - Beginning Development
   3 - Initial Implementation
   4 - Full Implementation
   5 - Full Implementation and Sustainability

| Academic Standards | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| ELA – Common Core State Standards for ELA | | | | | 5 |
| ELD (Aligned to ELA Standards) | | | | 4 | |
| Mathematics – Common Core State Standards for Mathematics | | | | | 5 |
| Next Generation Science Standards | | | | | 5 |
| History-Social Science | | | | | 5 |

2. **Rate the LEA's progress in making instructional materials that are aligned to the recently adopted academic standards and/or curriculum frameworks identified below available in all classrooms where the subject is taught.**

Rating Scale (lowest to highest):
1 - Exploration and Research Phase
2 - Beginning Development
3 - Initial Implementation
4 - Full Implementation
5 - Full Implementation and Sustainability

| Academic Standards | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| ELA – Common Core State Standards for ELA | | | | | 5 |
| ELD (Aligned to ELA Standards) | | | | | 5 |
| Mathematics – Common Core State Standards for Mathematics | | | | | 5 |
| Next Generation Science Standards | | | | | 5 |
| History-Social Science | | | | | 5 |

3. **Rate the LEA's progress in implementing policies or programs to support staff in identifying areas where they can improve in delivering instruction aligned to the recently adopted academic standards and/or curriculum frameworks identified below (e.g., collaborative time, focused classroom walkthroughs, teacher pairing).**

Rating Scale (lowest to highest):
1 - Exploration and Research Phase
2 - Beginning Development
3 - Initial Implementation
4 - Full Implementation
5 - Full Implementation and Sustainability

| Academic Standards | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| ELA – Common Core State Standards for ELA | | | | | 5 |
| ELD (Aligned to ELA Standards) | | | | | 5 |
| Mathematics – Common Core State Standards for Mathematics | | | | | 5 |
| Next Generation Science Standards | | | | | 5 |
| History-Social Science | | | | | 5 |

**Other Adopted Academic Standards**

**4. Rate the LEA's progress implementing each of the following academic standards adopted by the state board for all students.**

Rating Scale (lowest to highest):
1 - Exploration and Research Phase
2 - Beginning Development
3 - Initial Implementation
4 - Full Implementation
5 - Full Implementation and Sustainability

| Academic Standards | 1 | 2 | 3 | 4 | 5 | N/A |
|---|---|---|---|---|---|---|
| Career Technical Education | | | | 4 | | |
| Health Education Content Standards | | | | | 5 | |
| Physical Education Model Content Standards | | | | 4 | | |
| Visual and Performing Arts | | | | | 5 | |
| World Language | | | | 4 | | |

**Support for Teachers and Administrators**

**5. Rate the LEA's success at engaging in the following activities with teachers and school administrators during the prior school year (including the summer preceding the prior school year).**

Rating Scale (lowest to highest):
1 - Exploration and Research Phase
2 - Beginning Development
3 - Initial Implementation
4 - Full Implementation
5 - Full Implementation and Sustainability

| Academic Standards | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| Identifying the professional learning needs of groups of teachers or staff as a whole | | | | | 5 |
| Identifying the professional learning needs of individual teachers | | | | | 5 |
| Providing support for teachers on the standards they have not yet mastered | | | | | 5 |

**Optional Narrative (Limited to 1,500 characters)**

**6. Provide any additional information in the text box provided in the Dashboard that the LEA believes is relevant to understanding its progress implementing the academic standards adopted by the state board.**

## Parental Involvement and Family Engagement (LCFF Priority 3)

### Introduction

Family engagement is an essential strategy for building pathways to college and career readiness for all students and is an essential component of a systems approach to improving outcomes for all students. More than 30 years of research has shown that family engagement can lead to improved student outcomes (e.g., attendance, engagement, academic outcomes, social emotional learning, etc.).

Consistent with the California Department of Education's (CDE's) Family Engagement Toolkit: [1]

- Effective and authentic family engagement has been described as an intentional partnership of educators, families and community members who share responsibility for a child from the time they are born to becoming an adult.
- To build an effective partnership, educators, families, and community members need to develop the knowledge and skills to work together, and schools must purposefully integrate family and community engagement with goals for students' learning and thriving.

The LCFF legislation recognized the importance of family engagement by requiring LEAs to address Priority 3 within their LCAP. The self-reflection tool described below enables LEAs to reflect upon their implementation of family engagement as part of their continuous improvement process and prior to updating their LCAP.

For LEAs to engage all families equitably, it is necessary to understand the cultures, languages, needs and interests of families in the local area. Furthermore, developing family engagement policies, programs, and practices needs to be done in partnership with local families, using the tools of continuous improvement.

## Instructions

This self-reflection tool is organized into three sections. Each section includes research and evidence-based practices in family engagement:

1. Building Relationships between School Staff and Families
2. Building Partnerships for Student Outcomes
3. Seeking Input for Decision-Making

Based on an evaluation of data, including educational partner input, an LEA uses this self-reflection tool to report on its progress successes and area(s) of need related to family engagement policies, programs, and practices. This tool will enable an LEA to engage in continuous improvement and determine next steps to make improvements in the areas identified. The results of the process should be used to inform the LCAP and its development process, including assessing prior year goals, actions and services and in modifying future goals, actions, and services in the LCAP.

LEAs are to implement the following self-reflection process:

1. Identify the diverse educational partners that need to participate in the self-reflection process in order to ensure input from all groups of families, staff and students in the LEA, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.

2. Engage educational partners in determining what data and information will be considered to complete the self-reflection tool. LEAs should consider how the practices apply to families of all student groups, including families of unduplicated students and families of individuals with exceptional needs as well as families of underrepresented students.

3. Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each of the 12 practices using the following rating scale (lowest to highest):

   1 – Exploration and Research
   2 – Beginning Development
   3 – Initial Implementation
   4 – Full Implementation
   5 – Full Implementation and Sustainability

4. Based on the analysis of educational partner input and local data, respond to each of the prompts pertaining to each section of the tool.

5. Use the findings from the self-reflection process to inform the annual update to the LCAP and the LCAP development process, as well as the development of other school and district plans.

**Sections of the Self-Reflection Tool**

**Section 1: Building Relationships Between School Staff and Families**

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

1 - Exploration and Research Phase
2 - Beginning Development
3 - Initial Implementation
4 - Full Implementation
5 - Full Implementation and Sustainability

| Practices | Rating Scale Number |
|---|---|
| 1. Rate the LEA's progress in developing the capacity of staff (i.e., administrators, teachers, and classified staff) to build trusting and respectful relationships with families. | 4 |
| 2. Rate the LEA's progress in creating welcoming environments for all families in the community. | 5 |
| 3. Rate the LEA's progress in supporting staff to learn about each family's strengths, cultures, languages, and goals for their children. | 4 |
| 4. Rate the LEA's progress in developing multiple opportunities for the LEA and school sites to engage in 2-way communication between families and educators using language that is understandable and accessible to families. | 5 |

**Building Relationships Dashboard Narrative Boxes (Limited to 3,000 characters)**

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Relationships Between School Staff and Families.

Sherwood has high satisfaction ratings from the community survey for "Curriculum, in terms of Montessori Authenticity", "Teachers at Sherwood", and "School Climate in Terms of Respectfulness and Inclusivity". Sherwood has a bilingual/biliterate Office Manager available for Spanish speaking families and students.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Relationships Between School Staff and Families.

We need to bring back structure of SMPO and get more parents involved. The office staff has been taking on more and more as parents became less involved. A group of enthusiastic parents has been identified to lead the SMPO next year.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Relationships Between School Staff and Families.

We have our survey, but it is anonymous so we can't be sure who is filling it. Teachers are often the primary source of communication, so regular meetings between the school Director and teachers have been a good vehicle to get that feedback to administration. The school Director is now holding monthly Coffee with the Director, a practice started before the pandemic, and parents are starting to attend.

## Section 2: Building Partnerships for Student Outcomes

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

1 - Exploration and Research Phase
2 - Beginning Development
3 - Initial Implementation
4 - Full Implementation
5 - Full Implementation and Sustainability

| Practices | Rating Scale Number |
|---|---|
| 5. Rate the LEA's progress in providing professional learning and support to teachers and principals to improve a school's capacity to partner with families. | 5 |
| 6. Rate the LEA's progress in providing families with information and resources to support student learning and development in the home. | 4 |
| 7. Rate the LEA's progress in implementing policies or programs for teachers to meet with families and students to discuss student progress and ways to work together to support improved student outcomes. | 5 |
| 8. Rate the LEA's progress in supporting families to understand and exercise their legal rights and advocate for their own students and all students. | 5 |

### Building Partnerships Dashboard Narrative Boxes (Limited to 3,000 characters)

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Building Partnerships for Student Outcomes.

77% of respondents agree or strongly agree that they are satisfied with the opportunity to make an impact in academic outcomes for my student/s.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Building Partnerships for Student Outcomes.

While 77% shows a strong majority, this is down 4% from previous year's data. We are focusing on getting more parents involved through the parent ogranization, the SMPO.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Building Partnerships for Student Outcomes.

Input indicates that having a bilingual Office Manager is greatly appreciated and reaching out in the primary language of Spanish will continue and expand.

## Section 3: Seeking Input for Decision-Making

Based on the analysis of educational partner input and local data, identify the number which best indicates the LEA's current stage of implementation for each practice in this section using the following rating scale (lowest to highest):

1 - Exploration and Research Phase
2 - Beginning Development
3 - Initial Implementation
4 - Full Implementation
5 - Full Implementation and Sustainability

| Practices | Rating Scale Number |
|---|---|
| 9. Rate the LEA's progress in building the capacity of and supporting principals and staff to effectively engage families in advisory groups and with decision-making. | 4 |
| 10. Rate the LEA's progress in building the capacity of and supporting family members to effectively engage in advisory groups and decision-making. | 4 |
| 11. Rate the LEA's progress in providing all families with opportunities to provide input on policies and programs, and implementing strategies to reach and seek input from any underrepresented groups in the school community. | 5 |
| 12. Rate the LEA's progress in providing opportunities to have families, teachers, principals, and district administrators work together to plan, design, implement and evaluate family engagement activities at school and district levels. | 4 |

**Seeking Input for Decision-Making Dashboard Narrative Boxes (Limited to 3,000 characters)**

1. Based on the analysis of educational partner input and local data, briefly describe the LEA's current strengths and progress in Seeking Input for Decision-Making.

The school uses a variety of ways, including surveys, input at conferences and meetings, and at informal coffee discussions.

2. Based on the analysis of educational partner input and local data, briefly describe the LEA's focus area(s) for improvement in Seeking Input for Decision-Making.

Strengthening the SMPO presence on campus is a focus area for the school that will give more opportunity for educational partners to give input to school personnel.

3. Based on the analysis of educational partner input and local data, briefly describe how the LEA will improve engagement of underrepresented families identified during the self-reflection process in relation to Seeking Input for Decision-Making.

Underrepresented families are given access and do utilize the current structures in place. Families who we do not hear from can be actively reached out to by school personnel.

## School Climate (LCFF Priority 6)

**Introduction**

The initial design of the Local Control Funding Formula recognized the critical role that positive school conditions and climate play in advancing student performance and equity. This recognition is grounded in a research base demonstrating that a positive school climate directly impacts indicators of success such as increased teacher retention, lower dropout rates, decreased incidences of violence, and higher student achievement.

In order to support comprehensive planning, LEAs need access to current data. The measurement of school climate provides LEAs with critical data that can be used to track progress in school climate for purposes of continuous improvement, and the ability to identify needs and implement changes to address local needs.

**Introduction**
LEAs are required, at a minimum, to annually administer a local climate survey. The survey must:

- Capture a valid measure of student perceptions of school safety and connectedness in at least one grade within each grade span the LEA serves (e.g. TK-5, 6-8, 9-12); and

- At a minimum, report disaggregated data by student groups identified in California Education Code 52052, when such data is available as part of the local school climate survey.

Based on the analysis of local data, including the local climate survey data, LEAs are to respond to the following three prompts. Each prompt response is limited to 3,000 characters. An LEA may provide hyperlink(s) to other documents as necessary within each prompt:

**Prompt 1 (DATA):** Describe the local climate survey data, including available data disaggregated by student groups. LEAs using surveys that provide an overall score, such as the California Healthy Kids Survey, are encouraged to report the overall score for all students as well as available student group scores. Responses may also include an analysis of a subset of specific items on a local survey and additional data collection tools that are particularly relevant to school conditions and climate.

The local climate survy data shows that younger students (grades 1-3) report more satisfaction with school than do older students (grades 4-8). An exception to this is the middle school students (grades 7&8) reporting the highest levels of agreement with "I get to do interesting things at school" and "I feel safe at school".

**Prompt 2 (MEANING):** Describe key learnings, including identified needs and areas of strength determined through the analysis of data described in Prompt 1, including the available data disaggregated by student group.

The generally higher level of satisfaction among younger students is likely a product of developmental tendencies of children. Pre-adolescent and adolescent children typically begin to separate from adults in their formation of their self-identity. The middle school satisfaction with "interesting things" relates to their project-based learning, their field trip to Ashland for Shakespeare and their excursions into the community to rate restaurants (opinion writing). Areas rated low by students in 1-6 include the kindness of other students and the school rules.

**Prompt 3 (USE):** Describe any changes to existing plans, policies, or procedures that the LEA determines necessary in order to address areas of need identified through the analysis of local data and the identification of key learnings. Include any revisions, decisions, or actions the LEA has, or will, implement for continuous improvement purposes.

There will be more emphasis on systemic social-emotional learning (SEL) in the 2024-2025 school year, with opportunities to build community among the children and skills that lead to stronger friendships.

## Access to a Broad Course of Study (LCFF Priority 7)

LEAs provide a narrative summary of the extent to which all students have access to and are enrolled in a broad course of study by addressing, at a minimum, the following four prompts:

1. Briefly identify the locally selected measures or tools that the LEA is using to track the extent to which all students have access to, and are enrolled in, a broad course of study, based on grade spans, unduplicated student groups, and individuals with exceptional needs served. (response limited to 1,500 characters)

We measured course access by evaluating the implemented curricula and MTSS records.

2. Using the locally selected measures or tools, summarize the extent to which all students have access to, and are enrolled in, a broad course of study. The summary should identify any differences across school sites and student groups in access to, and enrollment in, a broad course of study, and may describe progress over time in the extent to which all students have access to, and are enrolled in, a broad course of study. (response limited to 1,500 characters)

We found that curricula represents all areas in the State Priorities.

3. Given the results of the tool or locally selected measures, identify the barriers preventing the LEA from providing access to a broad course of study for all students. (response limited to 1,500 characters)

There are no identified barriers preventing the school from providing access.

4. In response to the results of the tool or locally selected measures, what revisions, decisions, or new actions will the LEA implement, or has the LEA implemented, to ensure access to a broad course of study for all students? (response limited to 1,500 characters)

Sherwood will implement systemic social-emotional learning curriculum in the 2024-2025 school year.

## Coordination of Services for Expelled Students – COE Only (LCFF Priority 9)

**Assess the degree of implementation of the progress in coordinating instruction for expelled students in your county.**

Rating Scale (lowest to highest):
1 - Exploration and Research Phase
2 - Beginning Development
3 - Initial Implementation
4 - Full Implementation
5 - Full Implementation and Sustainability

| Coordinating Instruction | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| 1. Assessing status of triennial plan for providing educational services to all expelled students in the county, including: | [No response required] | [No response required] | [No response required] | [No response required] | [No response required] |
| a. Review of required outcome data. | | | | | |
| b. Identifying existing educational alternatives for expelled pupils, gaps in educational services to expelled pupils, and strategies for filling those service gaps. | | | | | |
| c. Identifying alternative placements for pupils who are expelled and placed in district community day school programs, but who fail to meet the terms and conditions of their rehabilitation plan or who pose a danger to other district pupils. | | | | | |
| 2. Coordinating on development and implementation of triennial plan with all LEAs within the county. | | | | | |
| 3. Establishing ongoing collaboration and policy development for transparent referral process for LEAs within the county to the county office of education or other program options, including dissemination to all LEAs within the county a menu of available continuum of services for expelled | | | | | |

| Coordinating Instruction | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| students. | | | | | |
| 4. Developing memorandum of understanding regarding the coordination of partial credit policies between district of residence and county office of education. | | | | | |

## Coordination of Services for Foster Youth – COE Only (LCFF Priority 10)

**Assess the degree of implementation of coordinated service program components for foster youth in your county.**

Rating Scale (lowest to highest):

1 - Exploration and Research Phase
2 - Beginning Development
3 - Initial Implementation
4 - Full Implementation
5 - Full Implementation and Sustainability

| Coordinating Services | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| 1. Establishing ongoing collaboration and supporting policy development, including establishing formalized information sharing agreements with child welfare, probation, Local Education Agency (LEAs), the courts, and other organizations to support determining the proper educational placement of foster youth (e.g., school of origin versus current residence, comprehensive versus alternative school, and regular versus special education). | | | | | |
| 2. Building capacity with LEA, probation, child welfare, and other organizations for purposes of implementing school-based support infrastructure for foster youth intended to improve educational outcomes (e.g., provide regular professional development with the Foster Youth Liaisons to facilitate adequate transportation services for foster youth). | | | | | |
| 3. Providing information and assistance to LEAs regarding the educational needs of foster youth in order to improve educational outcomes. | | | | | |

| Coordinating Services | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| 4. Providing direct educational services for foster youth in LEA or county-operated programs provided the school district has certified that specified services cannot be provided or funded using other sources, including, but not limited to, Local Control Funding Formula, federal, state or local funding. | | | | | |
| 5. Establishing ongoing collaboration and supporting development of policies and procedures that facilitate expeditious transfer of records, transcripts, and other relevant educational information. | | | | | |
| 6. Facilitating the coordination of post-secondary opportunities for youth by engaging with systems partners, including, but not limited to, child welfare transition planning and independent living services, community colleges or universities, career technical education, and workforce development providers. | | | | | |
| 7. Developing strategies to prioritize the needs of foster youth in the community, using community-wide assessments that consider age group, geographical area, and identification of highest needs students based on academic needs and placement type. | | | | | |
| 8. Engaging in the process of reviewing plan deliverables and of collecting and analyzing LEA and COE level outcome data for purposes of evaluating effectiveness of support services for foster youth and whether the investment in services contributes to improved educational outcomes for foster youth. | | | | | |

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Class Assignment Policy**

**Date:** June 19, 2024

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**SUMMARY**

The Class Assignment Policy describes processes we currently use to create class assignments.

**DISCUSSION**

Sherwood creates class lists based on teacher and staff recommendations, primarily, with considerations to balancing classrooms for age, gender, behavior, student relationships, and academic needs. We also take parent input, but do not always choose to assign classrooms based on parent input. Our Parent Input Form states this clearly, and teachers and staff reinforce this with communication to parents. A Board approved policy would formalize this practice and provide clarity to all stakeholders.

**ACTION REQUESTED**

Approve policy.

Attachment: DRAFT Class Assignment Policy, Parent Input Form

SHERWOOD MONTESSORI

## PARENT INPUT FOR CLASSROOM ASSIGNMENT 2024-2025

As we begin our planning for next year, we would like to give parents an opportunity to share their perspectives on what classroom environment works best for their child.
The class assignments will be balanced by a number of factors including age, gender, and social dynamics. Parent requests are an important part of the decisions as parents know their kids well and we value parents' input, however, we ask that parents please understand that requests will be considered but specific requests for teachers is NOT guaranteed. Your support and understanding in this process is greatly appreciated.

**Student's Name:**_____

**Current grade level:**_____**Grade level in 2024-2025**_____

**Please describe your child's academic strengths and any areas of concern as specifically as possible:**

_____

_____

_____

_____

**Please describe the ideal teaching style/classroom environment for your child:**

_____

_____

_____

_____

_____

**If your student has a sibling that could be in the same class, please indicate your preference:**

☐ **I feel it would be best to have my children in the same learning environment.**

☐ **It would work better for my children to be in different classrooms.**

***Please complete other side.***

**I understand that my input and/or request will be taken into consideration but that this is in no way a guarantee for classroom placement with a specific teacher. Further, I understand that decisions about class assignment involve a consideration of how the classrooms work as a whole. Due to the requirement that school staff preserve other students' confidentiality, it may not be possible for school staff to share all of the factors that go into the decision making process.**

**Parent signature:**_____ **Date:**_____

**You may use this space to add more comments if you wish.**

SHERWOOD MONTESSORI

**MEMORANDUM**

**To:** Board of Directors

**From:** Michelle Yezbick, School Director

**Subject:** **Title IX Policy**

**Date:** June 19, 2024

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**SUMMARY**

Title IX regulations require that the school adopt and publish a policy that describes grievance procedures, a notice of nondiscirimination, and the designated Title IX Coordinator.

**DISCUSSION**

- Schools must adopt, publish, and implement a Title IX policy and Title IX grievance procedures
- Provide notice of nondiscrimination to: (1) applicants for admission and employment, (2) students, parents/guardians, employees, and (3) all unions or professional organizations holding collective bargaining or professional agreements with the school
- Must prominently display the notice on the school's website and in each handbook/catalog, announcement, and application form that it makes available to the stakeholders listed above or uses for the recruitment of students or employees
-

The notice of nondiscrimination must state:

- The name or title, office address, email address, and telephone number of the Title IX Coordinator(s).
- That the school does not discriminate on the basis of sex and prohibits sex discrimination in its education program or activity as required by Title IX and the regulations.
- How to locate the nondiscrimination policy and grievance procedures.
- How to make reports and complaints of sex discrimination.
- That inquiries about the application of Title IX and Part 106 to the school may be referred to the Title IX Coordinator(s), to the Office for Civil Rights, or both.

**ACTION REQUESTED**

Adopt Policy

Attachment: DRAFT Title IX Policy

SHERWOOD MONTESSORI

# Title IX Policy and Grievance Procedures

## Board Policy:

**A.** Sherwood Montessori ("School") is committed to maintaining a safe and respectful school environment that is free from discrimination and harassment. Title IX of the Education Amendment Act of 1972 ("Title IX") prohibits discrimination on the basis of sex, including sexual harassment, in School's education programs and activities.

**B.** This Title IX Policy for Sexual Harassment ("Policy") details the School's commitment to maintain a learning environment that is free from sexual harassment and provides a grievance process for allegations of sexual harassment as defined under Title IX. Any individual can report sexual harassment at School to School staff (e.g., Principal, teachers, etc.), and the School will take appropriate action in accordance with this Policy.

**C.** Upon receipt of any report of Sexual Harassment, the Title IX Coordinator or designee will follow steps outlined in the School's Grievance Procedures for Sexual Harassment to make a final decision and provide remedies to the complainant, as/if deemed appropriate.

**D.** Either party may appeal the School's Written Decision, or its dismissal of a formal complaint or any allegation in the complaint, within **five (5) calendar days of the decision**. An appeal may be made on any of the following grounds: A procedural irregularity affected the outcome.

a. New evidence that was not reasonably available at the time the determination regarding responsibility or dismissal was made that could affect the outcome of the matter.

b. The Title IX Coordinator, Investigator, or Decision-Maker had a conflict of interest or bias for or against complainant or respondent that affected the outcome of the matter.

Upon receipt of an appeal, School will provide a written notification to the other party about the appeal that gives both parties a reasonable, equal opportunity to submit a written statement in support of/challenging the appeal.

The Title IX Appeals Officer (not Decision-Maker, Title IX Coordinator, or Investigator) shall issue a written decision of an appeal, including the rationale for the result, to both parties simultaneously. The Title IX Appeals Officer will endeavor to issue their decision within **thirty (30) calendar days from the receipt of the appeal**.

## Administrative Regulation:

**A.** Sherwood Montessori ("School") is committed to maintaining a safe and respectful school environment that is free from discrimination and harassment. Title IX of the Education Amendment Act of 1972 ("Title IX") prohibits discrimination on the basis of sex, including sexual harassment, in School's education programs and activities.

*Definition of Sexual Harassment Under California Law*

California Education Code section 212.5 defines sexual harassment as any unwelcome sexual advances, requests for sexual advances, requests for sexual favors, or other verbal, visual, or physical conduct of a sexual nature made by someone from or in the work or educational setting, under the following conditions:

- Submission to the conduct is explicitly or implicitly made a term or a condition of an individual's employment, academic status, or progress.
- Submission to, or rejection of the conduct by the individual is used as the basis of employment or academic decisions affecting the individual.
- The conduct has the purpose or effect of having a negative impact upon the individual's work or academic performance, or of creating an intimidating, hostile, or offensive work or educational environment.
- Submission to, or rejection of, the conduct by the individual is used as the basis for any decisions affecting the individual regarding benefits and services, honors, programs, or activities available at or through the educational institution.

Sexual harassment may include, but is not limited to:

- Unwelcome verbal conduct such as suggestive, derogatory comments, sexual innuendoes, slurs, or unwanted sexual advances, invitations, or comments; pestering for dates; making threats; or spreading rumors about or rating others as to sexual activity or performance.
- Unwelcome visual conduct such as displays of sexually suggestive objects, pictures, posters, written material, cartoons, or drawings; graffiti of a sexual nature; or use of obscene gestures.
- Unwelcome physical conduct such as unwanted touching, pinching, kissing, patting, hugging, blocking of normal movement, assault; or interference with work or study directed at an individual because of the individual's sex, sexual orientation, or gender.
- Threats and demands or pressure to submit to sexual requests in order to keep a job or academic standing or to avoid other loss, and offers of benefits in return for sexual favors.

Under Education Code section 230, harassment and other discrimination on the basis of sex include, but are not limited to, the following: exclusion of a person or persons from

participation in, denial of the benefits of, or subjection to harassment or other discrimination in, any academic, extracurricular, research, occupational training, or other program or activity; and exclusion from participation in, or denial of equivalent opportunity in, athletic programs. The full definition of discrimination and harassment based on sex from Education Code section 230 can be found here: http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC&sectionNum=230.

The definition of sexual harassment under California law and the definition of Sexual Harassment under Title IX overlap in some areas. Complaints alleging unlawful discrimination, harassment, intimidation, or bullying based on gender, sex, gender identity or expression, or sexual orientation are eligible to be investigated pursuant to School's Uniform Complaint Procedures. However, if any complaints alleging sexual harassment constitute Sexual Harassment as defined under Title IX (see below), the complaints shall be investigated under the Title IX Grievance Procedures for Sexual Harassment. School prohibits retaliatory behavior against anyone who files a sexual harassment complaint or any participant in the complaint investigation process.

*Sex Equity in Education Act Statement*

Students have all the rights set forth in Education Code section 221.8 (as applicable to School's programs). This includes the right to fair and equitable treatment, the right to a school environment without discrimination on the basis of sex, and right to be provided with an equitable opportunity to participate in all academic extracurricular activities. The description of all rights set forth in Education Code section 221.8 can be found here: http://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?lawCode=EDC&sectionNum=221.8.

For more information about Gender Equity/Title IX, please visit the following CDE website: https://www.cde.ca.gov/re/di/eo/genequitytitleix.asp.

## B. Title IX Grievance Procedures for Sexual Harassment

### 1. Scope and Jurisdiction

This Policy's Title IX grievance procedures apply only to conduct that falls within the definition of "Sexual Harassment" under Title IX. School employees or students may submit formal complaints of Sexual Harassment for investigation under this Policy. Sexual Harassment under Title IX means conduct on the basis of sex that falls within one or more of the following categories:

1. A School employee conditioning the provision of a school aid, benefit, or service on an individual's participation in unwelcomed sexual conduct.

2. Unwelcomed conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to School's education program or activity.

3. Sexual assault, dating violence, domestic violence, or stalking (as those terms are defined in 34 CFR section 106.30(a)(3)).

**2. Title IX Personnel**

School has designated the following individual as its Title IX Coordinator to coordinate the investigation and resolution of Sexual Harassment formal complaints as outlined in this Policy:

Michelle Yezbick
Director
Sherwood Montessori
1010 Cleveland Ave., Chico, CA 95928
(530) 345-6600
michelle@sherwoodmontessori.org

The Title IX Coordinator may designate other individual(s) to fulfill all or part of their duties. In addition to the Title IX Coordinator, the following Title IX Personnel are involved in the grievance process to address formal complaints:

- Investigator: The individual responsible for gathering all evidence related to the formal complaint. This individual will create an "Investigation Report" which will summarize the relevant evidence.

- Decision-Maker: The individual responsible for evaluating evidence in order to make a determination regarding the formal complaint. The Decision-Maker submits a written determination of findings to the parties. The Decision-Maker cannot be a Title IX Coordinator, the Investigator, or any individual involved in the investigation of the formal complaint.

- Title IX Appeals Officer: If applicable, this individual is responsible for evaluating an appeal of the final determination. The Title IX Appeals Officer cannot be a Title IX Coordinator, Investigator, Decision-Maker, or any individual involved in the investigation of the formal complaint.

All Title IX Personnel (i.e., Title IX Coordinator, Investigator(s), Decision-Maker(s), Appeals Officer(s), and any person who facilitates an informal resolution process) will receive training in accordance with Title IX requirements. The Title IX Coordinator must ensure individuals responsible for investigating a formal complaint are neutral.

### 3. Reporting Allegations of Sexual Harassment

Any individual (e.g., a student or employee who is alleged to be a victim of Sexual Harassment or a parent/guardian of a student who is alleged to be a victim of Sexual Harassment), may report Sexual Harassment directly to the School Title IX Coordinator, or to any other available School employee who shall immediately inform the Title IX Coordinator. Reports of Sexual Harassment can be made in-person, by mail, by telephone, by electronic mail, or by any other means that result in a Title IX Coordinator receiving the person's verbal or written report.

### 4. School's Initial Response to a Report of Sexual Harassment

Upon receipt of any report of Sexual Harassment, the Title IX Coordinator or designee will take the following steps. These steps are offered regardless of whether the complainant submits a formal written complaint:

1. Contact Complainant and Determine Need for Supportive Measures: The Title IX Coordinator will contact the complainant and respondent[1] to discuss the availability of supportive measures to stop the harassment, protect students, and ensure access to the educational program. If a formal complaint was not filed, the Title IX Coordinator shall explain to complainant the right to file a formal complaint and the process for filing a formal complaint. A formal complaint is one that contains the complainant's physical or digital signature, and it may be filed at any time with the Title IX Coordinator in person, by mail, or by email. A complainant may use the attached Title IX form to submit a formal complaint to the Title IX Coordinator.

    a. Supportive measures are nondisciplinary and non-punitive and shall be available at any point during the Title IX investigation. Supportive measures may include, but are not limited to: wellness check-ins, counseling services, extension of deadlines or course-related adjustments, modifications of work or class schedules, changes in work locations, or leaves of absences. The Title IX Coordinator is responsible for implementing the supportive measures.

2. Determine Need for Emergency Removal: The Title IX Coordinator will review the facts to determine whether the respondent (either student or staff) may need to be removed from the educational program or activity to prevent any further sexual harassment and/or maintain the safety of students and staff.

    a. School may determine that removal from the educational program or activity is justified due to an immediate threat to the physical health or safety of any student or other individual arising from the allegations. School will conduct an individualized

[1] The "complainant" is the individual who is alleged to be the victim of conduct that could constitute Sexual Harassment. The "respondent" refers to the individual who has been reported to be the perpetrator of conduct that could constitute Sexual Harassment. If a parent or guardian has a legal right to act on behalf of a complainant or respondent, this right applies throughout all aspects of the Title IX matter, including the grievance process.

safety and risk analysis before the removal. School shall provide the respondent with notice and an opportunity to challenge the decision immediately following the removal.

b. Should the emergency removal be challenged by the respondent, they must meet with the Superintendent, who shall make the final decision.

c. If the respondent is a student, School is subject to applicable laws and school policies regarding involuntary removals, suspensions, and expulsions.

d. If the respondent is an employee, the employee may be placed on administrative leave during the formal complaint investigation.

**5. Initial Review of Formal Complaint**

If a formal complaint is filed, the Title IX Coordinator will review the complaint to determine whether it raises allegations that fall within the definition of Sexual Harassment under Title IX as described above. School may consolidate multiple formal complaints where the allegations of Sexual Harassment arise out of the same/related facts or circumstances.

If it does, the Title IX Coordinator will follow this Policy's grievance procedures for formal complaints. If it does not, the Title IX Coordinator will determine whether the complaint should be dismissed (as explained below) and/or investigated pursuant to another applicable School policy (e.g., Uniform Complaint Procedures).

**6. Voluntary Informal Resolution Process**

At any time after a formal complaint has been filed, but before reaching a determination regarding the allegation, School may offer an informal resolution process (such as a restorative justice or mediation session) to the complainant and respondent. However, the informal resolution process is not available where the complainant alleges that an employee sexually harassed a student. Participation in informal resolution is voluntary.

**7. Mandatory or Permissive Dismissal of Formal Complaint**

Under certain circumstances, a complaint must or should be dismissed by the Title IX Coordinator. The Title IX Coordinator will endeavor to make this determination no more than **ten (10) school days** from the date they receive the formal complaint.

1. Mandatory Dismissal: The Title IX Coordinator must dismiss the formal complaint if they determine any of the following:

    a. The alleged conduct would not constitute Sexual Harassment as defined under Title IX even if proved;

b. The alleged conduct did not occur in School's education program or activity; or

c. The alleged conduct did not occur against an individual in the United States.

2. Permissive Dismissal: The Title IX Coordinator may dismiss a formal complaint if they determine any of the following:

a. The complainant has notified School, in writing, that they would like to withdraw the complaint or any allegations in the complaint;

b. The respondent is no longer enrolled in, or employed by, School; or

c. Specific circumstances prevent the School from gathering evidence to reach a determination with regard to the complaint.

Written Notice of Dismissal: If the Title IX Coordinator dismisses the complaint, they must send written notice of the dismissal simultaneously to both parties (complainant and respondent) as follows:

- The written notice should state the reason(s) for the dismissal and inform the parties of their right to appeal in accordance with the procedures described in the "Appeals" section below.
- If the Title IX Coordinator determines another School grievance procedure (e.g., Uniform Complaint Procedures) is the appropriate grievance procedure for the complainant's allegation(s), the written notice shall inform the parties (complainant and respondent) of School's intent to investigate the complaint through that grievance procedure.

**8. Title IX Grievance Procedures**

If the Title IX Coordinator does not dismiss the formal complaint, School will initiate the following Title IX Grievance Procedures and issue a Written Decision. School will endeavor to complete its investigation and issue a Written Decision within **sixty (60) calendar days of receipt of the formal complaint**.

1. Send Written Notice of Formal Complaint

The Title IX Coordinator must provide the parties (complainant and respondent) with a Notice of Formal Complaint. The Title IX Coordinator will endeavor to provide this Notice within **ten (10) school days of receipt of the formal complaint**. The notice shall include: (1) a copy of this Policy; (2) a description of the allegations potentially constituting Sexual Harassment with sufficient details known at the time; (3) a statement that the respondent is presumed not responsible for conduct and that a determination regarding responsibility is made at the conclusion of the grievance process; (4) a statement informing the parties of the opportunity to have an advisor of their choice throughout the grievance process and the ability to inspect and

review evidence; and (5) a statement informing the parties that they must not knowingly make false statements or submit false information.

2. Investigator Conducts Investigation

   The Investigator will gather and review evidence related to the allegations. This can include, but is not limited to, interviewing parties or witnesses, as well as reviewing relevant evidence. The Investigator will not require, request, or rely upon any information protected under a legally recognized privilege, unless the person holding such privilege has waived it.

   Written notice of all investigative interviews or other meetings must be provided to any individual whose participation is invited or expected to be provided with sufficient time for the individual to prepare to participate. Notice must include the date, time, location, participants, and purpose of the meeting. Attendees of such meetings will have the right to be accompanied by an advisor of their choice.

3. Investigator Provides Parties Equal Opportunity to Review Gathered Evidence

   The Investigator will provide both the complainant and respondent with an equal opportunity to review the evidence that is directly related to the allegations raised in the formal complaint. The parties will have a period of at least **ten (10) calendar days** before the Investigative Report is provided to the parties to review the evidence, ask the Investigator additional questions, and provide or suggest additional evidence to be considered by the Investigator.

4. Investigator Prepares and Shares Investigative Report

   The Investigator will prepare an Investigative Report summarizing the relevant evidence. The Investigative Report is not School's final Written Decision. The Investigator will send the Investigative Report to the parties and their advisors, if any, for their review and written response at least **ten (10) calendar days** before issuance of the Written Decision. School will inform the parties in writing that they may submit to the Decision-Maker written, relevant questions that the parties want asked of any party or witness. The Decision-Maker is responsible for providing the responses (if any) to these questions to both parties.

5. Decision-Maker Issues Written Decision

   The Decision-Maker will endeavor to issue the Written Decision within **sixty (60) calendar days from the receipt of the formal complaint**. The Decision-Maker will issue a Written Decision to both parties simultaneously. The Decision-Maker uses the "preponderance of evidence" standard (i.e., it is more likely than not that the respondent committed the alleged conduct). The Written Decision will include all of the following:

      a. Identification of the allegations potentially constituting Sexual Harassment.

b. A description of the procedural steps taken by School during the investigation process (e.g., notifications to the parties, interviews with the parties and witnesses, site visits, or methods used to gather other evidence).

c. Findings of fact supporting the determination.

d. Conclusions regarding the application of School's policies to the facts.

e. A statement of, and rationale for, the result as to each allegation, including a decision regarding responsibility, any disciplinary sanctions School imposes on the respondent, and whether remedies designed to restore or preserve equal access to School's educational program will be provided by School to the complainant.

f. School's procedures and permissible bases for either party to appeal the decision.

6. Remedies

If School determines that the respondent engaged in Sexual Harassment, School will provide remedies to the complainant, as appropriate. This may include supportive measures. Remedies may also include: transfer from a class; parent/student conference(s); positive behavior support; warnings; detention; and/or formal discipline, such as suspension and expulsion. When an employee is found to have committed Sexual Harassment, School will take appropriate disciplinary action, up to and including termination, in accordance with School's policies and as permitted by law.

**9. Appeals**

Either party may appeal School's Written Decision, or its dismissal of a formal complaint or any allegation in the complaint, within **five (5) calendar days of the decision**. An appeal may be made on any of the following grounds:

1. A procedural irregularity affected the outcome.

2. New evidence that was not reasonably available at the time the determination regarding responsibility or dismissal was made that could affect the outcome of the matter.

3. The Title IX Coordinator, Investigator, or Decision-Maker had a conflict of interest or bias for or against complainant or respondent that affected the outcome of the matter.

Upon receipt of an appeal, School will provide a written notification to the other party about the appeal that gives both parties a reasonable, equal opportunity to submit a written statement in support of/challenging the appeal.

The Title IX Appeals Officer (not Decision-Maker, Title IX Coordinator, or Investigator) shall issue a written decision of an appeal, including the rationale for the result, to both parties simultaneously. The Title IX Appeals Officer will endeavor to issue their decision within **thirty (30) calendar days from the receipt of the appeal**.

**10. Record Keeping**

School will maintain for a period of seven (7) years records pertaining to Title IX Sexual Harassment allegations in accordance with 34 CFR section 106.45(b)(10), as well as all material used to train Title IX Personnel.

Adopted:

Amended:

## Title IX Sexual Harassment Complaint Form

**Instructions**: This form can be completed by any individual who has knowledge of a sexual harassment conduct occurring within an education program or activity of Sherwood Montessori ("School"). Please complete the information below. Should you need additional space or would like to provide documentation to support the allegations in the complaint, you can attach those to this complaint form. If you have any questions, please contact School's Title IX Coordinator listed below.

**Contact Information and Complainant's (Victim) Information**

Full Name of Person Filing the Complaint: _____

Address: _____

_____ _____

_____

Complainant's (Victim) Full Name (if different from above): _____

Phone: Email:

School Name:

**Respondent's (Accused) Information**

Respondent's Full Name: _____

Is the accused a School student? ☐ No ☐ Yes

If yes, what is the student's grade and relation to complainant: _____

Is the accused a School staff member? ☐ No ☐ Yes

If yes, what is the staff member's relation to the complainant (e.g., teacher)? _____

If no, what is the accused's affiliation to School?

**Details of Complaint**

Date of the Alleged Incident(s): _____ Location of Alleged Incident(s): _____

Please describe the facts underlying your complaint. Provide details such as the names of those involved, the dates of the incident(s), whether witnesses were present and the names of any witnesses, etc. Please provide any details which you feel might be helpful to a complaint investigator.

_____

_____

_____

_____

Did the harassment occur at School or during a School activity? If so, please describe:

_____

Did this incident interfere with your ability to access or participate in School programs or activities? If so, please describe:

_____

_____

_____

List the individuals involved in the relevant incident(s):

_____

_____

List any witnesses to the incident(s):

_____

By submitting this form to the School Title IX Coordinator, I wish to initiate School's formal Title IX Grievance Procedures.

_____ _____

Signature of Complainant Date

**Once you have completed this form, please submit it to the Title IX Coordinator:**

Michelle Yezbick
Director
Sherwood Montessori
1010 Cleveland Ave., Chico, CA 95928
(530) 345-6600
michelle@sherwoodmontessori.org