

Osprey Wilds
Environmental Learning Center

Three Rivers Montessori
Renewal Evaluation Report

Issued January 21, 2025
Revised May 23, 2025

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Report Introduction

Osprey Wilds Environmental Learning Center (Osprey Wilds or OW), consistent with Minnesota Statutes Chapter 124E and as part of our commissioner-approved authorizing plan and the charter contracts with each school we authorize, evaluates the Academic, Environmental Education, Financial, and Operations performance of each school. These evaluations determine whether Osprey Wilds will renew the school for a new contract term and are completed to answer the following questions:

- Is the school's learning program fulfilling the primary purpose of charter schools, which is to improve the learning, achievement, and success of all students?
- Is the school financially viable and are its finances well managed?
- Is the school organization effective and is the school well governed?
- Is the school's learning program increasing students' environmental literacy?

These evaluations are summative, and ratings are given based on a school's performance over the course of the current contract term.

The complete Renewal Evaluation framework and information about the OW renewal process can be found at <https://ospreywilds.org/charter-school-division/csd-what-we-do/>.

Recommendation

The Osprey Wilds Charter School Division (CSD) recommends that the Osprey Wilds Environmental Learning Center Board of Directors renew the charter contract of Three Rivers Montessori (TRM) for a term of three (3) years, giving the school authority to provide instruction to students in Preschool-Grade 8 in the manner set forth in its Application for Charter Renewal, with a maximum total enrollment of 220 students. In accordance with Section 11.1(a)(3) of the charter contract, this recommendation is for a Correct Action Renewal ("probationary contract" or "probationary renewal"). As a result, the school must eliminate and resolve the deficiencies causing the Corrective Action Renewal and ensure that no additional deficiencies are created or identified during that renewal term in order to be eligible for a subsequent renewal. The OW Board of Directors affirmed this recommendation at its meeting on April 24, 2025.

PROCEDURAL HISTORY

Osprey Wilds, as the authorizer of TRM, identified concerns in the course of conducting the School's renewal evaluation related to the failure of the School to meet the requirements for student performance set forth in the charter contract, the failure of the School to meet generally accepted standards of fiscal management, insufficient enrollment to successfully operate a charter school, non-compliance with charter contract requirements and legal obligations, and the governing board's failure to fulfill fiduciary duties. The TRM board's failure to adequately fulfill the terms of its charter compelled OW to issue a Notice of Intent to Not Renew the Charter Contract (Notice of Intent) on March 17, 2025. TRM requested, and Osprey Wilds conducted on April 9, 2025, an informal hearing to review the intended non-renewal of the school's charter. After careful consideration of all information, Osprey Wilds found that critical deficiencies and non-compliance identified in OW's Notice of Intent have been sufficiently addressed and that TRM Board and administrative capacity at the time of renewal is sufficient to support a three-year Corrective Action Renewal containing time-bound conditions for continued operations outlined in the Plan of Correction below.

STUDENT PERFORMANCE

TRM's overall performance on its most recent academic evaluation does not meet standard, earning 39% of the points available through FY24, the most recent year for which data is available. TRM did not meet standard in any core academic area, including reading proficiency or growth, math proficiency or growth, and science proficiency. In addition, TRM's academic performance has declined across the contract period, earning 55% of the points through FY22, and 53% of the points through FY23.

TRM did not refute this data, nor did it provide any data demonstrating improved academic performance through FY25 (the current school year). The only data TRM provided is mid-year FastBridge test data showing that, on average, students at TRM scored lower than most students across the country. Specifically, in math, the average student did better than 44 out of every 100 students nationwide. In reading, the average student did better than 45 out of every 100 students nationwide. So while TRM's students are not at the very bottom, they are performing below the national average (which is the 50th percentile).

Although TRM did not provide any additional data to refute TRM's academic performance, Section 11.1(a)(1) of the Charter Contract states that OW will also consider the degree to which the School has fulfilled the primary purpose of charter schools ("to improve the learning, achievement, and success of all students") other than the attainment of goals specified in Exhibit G. Over the course of the current school year, TRM has implemented a range of strategies to improve the learning, achievement, and success of all students beyond traditional academic performance measures.

Under new leadership, TRM established a more structured and data-driven approach to student support. The team implemented a formal Multi-Tiered System of Supports (MTSS), using FastBridge assessments three times per year along with teacher input and data on academics, behavior, and attendance to identify students who need additional support. The MTSS team meets biweekly to adjust interventions and reports progress to the Board quarterly. Staff use FastBridge as a central tool to monitor growth and inform instruction schoolwide.

Targeted literacy support has become a key area of focus. TRM used Title I funds to deliver small-group reading interventions, especially for students identified through winter FastBridge assessments. An AmeriCorps Reading Corps tutor joined the school mid-year to provide individualized K-3 reading support. Several students met benchmarks and exited the program early. TRM has already secured a full-time tutor for next school year. TRM staff also launched a Read-at-Home program to encourage daily reading outside of school and coordinated volunteers to provide additional in-class reading support.

To promote social-emotional development, TRM implemented the Nurtured Heart social-emotional learning (SEL) curriculum across all grade levels. This program emphasizes relationship-building, emotional regulation, and positive behavior strategies, and aligns with the Montessori philosophy. Student survey data shows growth in SEL competencies, including an increased ability to understand and demonstrate compassion.

In addition to academic and behavioral interventions, TRM prioritized consistency in curriculum delivery. TRM teachers now follow aligned instructional practices, and TRM leadership uses assessment data to monitor and support implementation. TRM's Executive Director regularly reports progress to the Board, which is taking a more active role in overseeing academic and financial performance.

TRM has also increased its focus on inclusive education. General and special education staff work closely together to meet the needs of the school's high percentage of students with IEPs and those

eligible for free or reduced-price lunch. To further support the development of the whole child, TRM integrates environmental education through hands-on learning projects such as gardening, recycling, and rainwater harvesting. These combined efforts reflect a comprehensive approach to student success that addresses academic growth, social-emotional well-being, and environmental awareness.

In sum, based on the totality of the circumstances, OW has concluded that TRM has improved the learning, achievement, and success of all students such that TRM can be eligible for a Corrective Action Renewal.

FISCAL MANAGEMENT

Repeat findings in external financial audits. TRM directly addressed the repeat findings in its external financial audits related to the late payment of vendor claims. TRM acknowledged that although it had established a corrective action plan (CAP) in 2023, its initial implementation fell short. In response, TRM's Board and administration revised internal procedures, improved invoice approval workflows, and increased administrative oversight to ensure compliance with statutory requirements. TRM leadership emphasized their commitment to financial responsibility and stated that they are actively following the CAP during the current fiscal year. They expressed confidence that these changes will resolve the issue and prevent the finding from recurring in the FY25 audit.

Insufficient enrollment. TRM took several steps to address its previously insufficient enrollment, which had contributed to financial instability. TRM leadership and the Board identified key factors in the enrollment decline, including a district-mandated change to an earlier start time and concerns about school culture under prior leadership. In response, TRM strengthened communication with families, gathered feedback through exit surveys, and increased outreach efforts, including marketing and word-of-mouth referrals. As a result, enrollment began to rebound. For the upcoming school year, TRM has received 139 enrollment forms, with kindergarten nearly full and only a few open seats remaining; this is in contrast to – and an improvement upon -- its current enrollment of 119. The Board developed a budget based on conservative enrollment projections and anticipates ending FY25 with a surplus—achieved without drawing on TRM's line of credit—indicating a more sustainable financial and enrollment outlook.

Lease obligations. TRM has taken deliberate steps to reduce the financial strain of its long-term lease obligations, which were originally structured to accommodate 165 students. Recognizing the mismatch between projected and actual enrollment, TRM renegotiated its lease agreement with the landlord, resulting in a 19% reduction in lease costs. This renegotiation helped align facility expenses with current enrollment levels and improved TRM's eligibility for state lease aid. TRM's landlord also provided a letter of support affirming the continued partnership and flexibility moving forward. These changes, combined with overall cost reductions and increased enrollment, have positioned TRM to project a \$135,000 surplus for FY25, resulting in a fund balance of approximately \$219,000 (11.3%). While this does not meet standard, TRM provided a five year budget based on conservative enrollment projections that would allow it to meet a 20% fund balance target in the 2028-29 school year, significantly improving both its near-term financial health and long-term viability.

NON-COMPLIANCE WITH CHARTER CONTRACT AND LEGAL REQUIREMENTS

Non-compliance with the charter contract. TRM has taken meaningful action to address concerns about systemic governance and operational deficiencies, and the Board has shown

significant improvement in governance capacity. TRM acknowledged its history of leadership instability (having experienced five Executive Directors and 18 different Board members over four years) which hindered its ability to meet contractual obligations. The current TRM Board is stable, trained, and actively engaged in oversight functions, including regular monitoring of academics and finances. The Board has implemented new internal controls and corrected previously missing or noncompliant policies. These efforts demonstrate that the Board is functioning with greater discipline and focus, and has built foundational systems that support improved governance and fulfill its fiduciary responsibilities.

Non-compliance with legal requirements. The TRM Board has taken concrete steps to resolve prior non-compliance with legal requirements by adopting missing policies and implementing a formal process for evaluating the Executive Director. The Board conducted a comprehensive review of its policy manual, updated existing policies, and formally adopted those that were previously missing or non-compliant, including those related to procurement, data access and rights, nepotism, and other required policies. Additionally, the Board acknowledged that it failed to evaluate the Executive Director in the first two years of the charter term, but has since established a structured evaluation process aligned with Board policy. This process was used to complete the current Executive Director's evaluation, which included a self-assessment and Board feedback. These actions reflect the Board's commitment to ensuring legal compliance and improving organizational accountability.

Despite recent improvements in leadership and governance, TRM continues to face a critical need for leadership sustainability and formal succession planning to ensure long-term organizational stability. TRM has made notable progress under its current Executive Director, whose leadership has contributed to stronger academic systems, improved Board collaboration, and a more positive school culture. Given TRM's history of school leader and Board instability, the Board must proactively develop a clear succession plan that includes leadership development, continuity protocols, and communication strategies—succession planning for both Executive Director transition as well as turnover on the Board. Doing so will help preserve institutional knowledge, maintain progress during leadership transitions, and reinforce the systems now in place to support the school's continued growth and success.

PLAN OF CORRECTION

In accordance with Section 10.3(d) of the charter contract, Osprey Wilds has withdrawn its Notice of Intent to Not Renew and has developed the following Plan of Correction to be implemented by the school.

Monitoring and Accountability

- Quarterly Corrective Action Updates
 - o Submit quarterly written updates (October 31, January 31, April 30, July 31) summarizing progress on each element of the Plan of Correction and Exhibit S.
 - o Updates must be approved by the TRM Board prior to submission.
- Annual Review and Evaluation
 - o Beginning in 2026, by July 31 in each fiscal year of the Corrective Action Renewal, submit a Corrective Action Renewal impact report including data, documentation, and reflections on implementation, with a summary of lessons learned and any remaining areas for improvement.

Student Performance

- Academic Performance

- o TRM must earn at least 50% of the points possible on its Academic Performance Evaluation in each year of the contract period.
- o The School's Board of Directors must receive updates at least four times per year on student academic performance, including progress on contractually required academic and mission-related goals.
- o In accordance with the above, board meeting minutes must reflect discussion and monitoring of academic data, aligned to contractual goals, beginning with the September 2025 board meeting and continuing throughout the contract period.
- Data-Driven Instruction and Progress Monitoring
 - o Beginning September 2025, TRM must implement a process to disaggregate and analyze student assessment data by grade, student group (e.g. Special Education, English Learners, Free and Reduced Price Lunch, etc.), and intervention status at least three times / school year.
 - o Submit progress reports to the authorizer after each review (by October 31, January 31, April 30) outlining how the process informs curricular and instructional decisions to improve academic proficiency and growth.
- Academic Intervention Documentation
 - o In each year of the contract period, maintain documentation of all students receiving Tier 2 and Tier 3 interventions through the MTSS process, including baseline data, intervention logs, and progress updates.
 - o Submit bi-annual MTSS impact summaries in each year of the contract period (January 31 and July 31). The MTSS impact summary should provide a brief overview of how the school's MTSS framework is being implemented and the extent to which it is improving student outcomes. It should include key data on student progress, particularly for those receiving Tier 2 and Tier 3 interventions, and highlight any adjustments made to supports based on that data. The summary should also include reflections on what is working, challenges encountered, and next steps.
- Evaluation of Support Programs
 - o By July 31, 2026, evaluate and report on the effectiveness of key support programs (Reading Corps, Read-at-Home, Nurtured Heart SEL, etc.), including student outcomes and stakeholder feedback. Include recommendations for continuation or revision.

Fiscal Management

- Audit Findings Resolution
 - o In each year of the contract period, the school must receive an unqualified / unmodified audit opinion absent any significant deficiencies or material weaknesses and absent any repeat legal compliance findings.
- Enrollment Stability Plan
 - o By July 31, 2025, submit a three-year enrollment and marketing plan, including enrollment targets by grade, outreach strategies, retention efforts, and timelines.
 - o Provide monthly updates in the board packet on actual vs. projected enrollment during the 2025-26 school year, as required by Section 6.9(a) of the charter contract.
- Lease Monitoring and Affordability
 - o Provide a copy of the amended lease and the lease aid application via Aerie by September 30, 2025.
- Fund Balance Growth Plan
 - o By July 31, 2025, revise and resubmit a four-year financial plan (starting with the 2025-26 school year) aligned to realistic enrollment projections and annual fund balance targets. The financial plan should be presented in a manner consistent with

Osprey Wilds' Financial Plan Template. In addition, the financial plan should clearly show the impact of the lease renegotiation on TRM's budget and fund balance.

Governance and Legal Compliance

- Board Training and Capacity
 - o Ensure all board members complete initial and annual training as required by MN Stat. 124E.07 Subd. 7, and report on training status in the Annual Report (due annually to OW by November 1).
 - o Conduct a board self-assessment and training needs evaluation as required by MN Stat. 124E.07 by October 31, 2025, and share results and action steps.
- Board Decision-Making and Oversight
 - o Resolve the Outstanding Obligations from the Previous Contract (outlined in Exhibit S of the charter contract).
 - o The School's Board of Directors must monitor progress at least four times per year on resolution of the Outstanding Obligations from the Previous Contract (Exhibit S).
- Management Accountability
 - o By October 31, 2025, provide evidence of a finalized and Board-approved annual evaluation system for the Executive Director, including a timeline and performance criteria.
 - o Submit board meeting minutes via Aerie demonstrating the board has completed the 2025-26 school leader evaluation by August 5, 2026.
- Succession Planning
 - o By January 31, 2025, develop and adopt a formal succession plan for both the Executive Director and Board members. The plan must include leadership development strategies, knowledge transfer protocols, communication steps, and an emergency succession process for the school leader.

Prior to any future contact period (i.e., by June 30, 2025), the school must:

- Revise the teacher evaluation and peer review process to comply with MN Stat. § 122A.40 Subd.8 (b), clauses 2-13.
- Adopt a Minnesota Parent Aware-approved assessment tool and ensure it is implemented at both program entry and exit.
- Ensure the school's Special Education Advisory Council consists of at least half parents of students with a disability in accordance with MN Stat. §125A.24.
- Update the enrollment packet to include the full MN Language Survey.
- Revise the Language Instruction Educational Program (LIEP) Plan to comply with revised requirements for MDE.
- Revise its bylaws for compliance with statutory requirements and contractual obligations.
- Adopt all required policies and plans:
 - o Student Journalist Policy
 - o Library Materials Policy
 - o Records Retention Schedule
 - o Title IX Policy
 - o Language Instruction Educational Program (LIEP) Plan
 - o Comprehensive Achievement and Civic Readiness (CACR) Strategic Plan (formerly World's
 - o Best Workforce Strategic Plan)
- Revise the following policies to comply with statute:
 - o Public Data Access Policy
 - o Data Subject Rights and Access Policy
 - o Nepotism Policy
 - o Personnel Policies (i.e. Employee / Staff Handbook)

- o Admissions Policies and Procedures (including Early Entrance to Kindergarten)
- Revise the school leader evaluation process to evaluate performance in relation to OW contractual academic and environmental education goals and expectations, in accordance with MN Stat. §124E.07 Subd. 6.
- In accordance with MN §121A.035, Subd. 2, conduct and document the required number of lockdown, fire, and tornado drills in the current school year.
- In the 2024-2025 school year, notify parents and guardians about the school's policy requiring a criminal history background check on employees and other individuals who provide services to the school, and identify those positions subject to a background check and the extent of the hiring authority's discretion in requiring a background check in accordance with MN §123B.03 Subd. 1(e).
- Revise the school website to meet statutory and contractual requirements.

TIMELINE OF PLAN OF CORRECTION ACTIONS

n.b. The list below is a summary. Additional detail about each required action is provided in the Notice of Deficiency.

Three Rivers Montessori must submit quarterly written updates (October 31, January 31, April 30, July 31) summarizing progress on each element of the Plan of Correction and Exhibit S. Corrective Actions are organized below by date of submission. Updates must be approved by the TRM Board prior to submission.

Beginning in 2026, by July 31 in each fiscal year of the Corrective Action Renewal, TRM must submit a Corrective Action Renewal impact report including data, documentation, and reflections on implementation, with a summary of lessons learned and any remaining areas for improvement.

Deadline	Required Action
July 31, 2025	Submit a three-year enrollment and marketing plan.
July 31, 2025	Revise and resubmit a four-year financial plan.
September 30, 2025	Provide a copy of the amended lease and the lease aid application via Aerie.
October 31, 2025	Provide evidence of a finalized and Board-approved annual evaluation system for the Executive Director.
October 31, 2025 October 31, 2026 October 31, 2027	Submit data-driven instruction progress report.
October 31, 2025 October 31, 2026 October 31, 2027	Conduct a board self-assessment and training needs evaluation as required by MN Stat. 124E.07 by October 31, 2025, and share results and action steps.
November 1, 2025 November 1, 2026 November 1, 2027	Report on initial and annual board member training in the Annual Report.

Deadline	Required Action
December 31, 2025 December 31, 2026 December 31, 2027	Submit an on-time, unqualified / unmodified audit opinion absent any significant deficiencies or material weaknesses and absent any repeat legal compliance findings.
January 31, 2026	Develop and adopt a formal succession plan for both the Executive Director and Board members.
January 31, 2026 January 31, 2027 January 31, 2028	Submit data-driven instruction progress report.
January 31, 2026 January 31, 2027 January 31, 2028	Submit bi-annual MTSS impact summary.
April 30, 2026 April 30, 2027 April 30, 2028	Submit data-driven instruction progress report.
July 31, 2026	Evaluate and report on the effectiveness of key support programs (Reading Corps, Read-at-Home, Nurtured Heart SEL, etc.)
July 31, 2026 July 31, 2027 July 31, 2028	Submit bi-annual MTSS impact summary.
July 31, 2026 July 31, 2027 July 31, 2028	Submit a Corrective Action Renewal impact report.
August 5, 2026	Submit board meeting minutes via Aerie demonstrating the board has completed the 2025-26 school leader evaluation.
During the 2025-26 school year, and ongoing	Provide monthly updates in the board packet on actual vs. projected enrollment.
Beginning September 2025, and ongoing	Board meeting minutes reflect discussion and monitoring of academic data.
Beginning September 2025, and ongoing	Board meeting minutes reflect discussion, monitoring, and resolution of the Outstanding Obligations from the Previous Contract (Exhibit S).

School Overview

Mission: Three Rivers Montessori empowers each student to reach their full potential as engaged citizens within their communities through caring for our planet and each other, bringing forth their gifts to meet the world's great need.

Vision: Through the Montessori method of education and rich outdoor experiential education, Three Rivers Montessori school educates students to be curious and reflective, skilled and creative, empathic and compassionate.

Description: Three Rivers Montessori offers a Montessori education to families living in Elk River and surrounding communities. Montessori supports a mastery learning model which affords students the opportunity to have actual experiences, and work with materials at a pace that matches their learning. Students often work together in small groups, and receive many of their lessons in that way. An uninterrupted work cycle of at least three hours occurs each morning, scheduling special classes for art, music, world languages and physical education outside that work period.

Year school opened: 2019

Year began with OW: 2017

Current contract period: July 1, 2017-June 30, 2025

School location: Elk River

Website: <https://threeriversmontessori.org/>

Grade levels served: Preschool-8

Student demographics: (per MDE Report Card Data)

Demographic Trends	2021-22	2022-23	2023-24
Total Enrollment	163	157	99
Special Education	16%	22%	26%
English Learners	1%	2%	5%
Free/Reduced Priced Lunch	12%	25%	38%
White	88%	93%	90%

Performance Evaluation Summaries

Academic	
Indicator 1: Mission Related Outcomes	Exceeds
Indicator 2: English Language Learners	N/A
Indicator 3: Reading Growth	Approaches
Indicator 4: Math Growth	Approaches
Indicator 5: Reading Proficiency	Does Not Meet
Indicator 6: Math Proficiency	Does Not Meet
Indicator 7: Science Proficiency	Does Not Meet
Indicator 8: Other Proficiency or Growth	N/A
Indicator 9: Post Secondary Readiness	N/A
Indicator 10: Attendance	Does Not Meet
Eligible for Renewal:	39%

Environmental Education	
Indicator 1: Awareness	Meets
Indicator 2: Knowledge	Meets
Indicator 3: Attitudes	Meets
Indicator 4: Skills	Meets
Indicator 5: Action	Meets

Financial	
Indicator 1: Financial Management	
1.1: Budgeting	Meets
1.2: Enrollment Variance	Does Not Meet
1.3: Financial Policies and Practices	Does Not Meet
1.4: Financial Reporting	Does Not Meet
1.5: Financial Audit	Does Not Meet
Indicator 2: Near-Term Financial Health	
2.1: Current Ratio	Meets
2.2: Days Cash on Hand	Approaches
Indicator 3: Financial Sustainability	
3.1: Fund Balance Percentage	Does Not Meet
3.2: Total Margin/Agg. 3-Year Margin	Does Not Meet
3.3: Debt to Asset Ratio	Does Not Meet

Operations	
Indicator 1: Educational Program	
1.1: Mission & Vision	Approaches
1.2: Instructional Practices	Approaches
1.3: Curriculum	Approaches
1.4: Assessment	Approaches
1.5: Professional Development	Approaches
1.6: Equity	Does Not Meet
1.7: Environmental Education Program	Meets
1.8: Educational Requirements	Does Not Meet
1.9: Special Education	Does Not Meet
1.10: English Learners	Does Not Meet
1.11: Parent & Student Satisfaction	Does Not Meet
Indicator 2: Governance	
2.1: Board Composition & Capacity	Does Not Meet
2.2: Board Decision-Making & Oversight	Does Not Meet
2.3: Management Accountability	Does Not Meet
2.4: Environmental Education Oversight	Approaches
Indicator 3: School Environment	
3.1: Facilities & Transportation	Meets
3.2: Health & Safety	Does Not Meet
3.3: Sustainable Operations	Approaches
Indicator 4: Student Rights	
4.1: Admissions & Enrollment	Does Not Meet
4.2: Due Process & Privacy	Meets
Indicator 5: Personnel Practices	
5.1: Licensure	Meets
5.2: Staff Retention	Does Not Meet
5.3: Employment Practices	Does Not Meet
Indicator 6: Compliance & Reporting	
6.1: Charter School Annual Reports	Does Not Meet
6.2: Insurance	Does Not Meet
6.3: Authorizer & State Compliance	Does Not Meet

Three Rivers Montessori
FY24 Academic Performance Evaluation
Contract Period July 1, 2017 through June 30, 2025

The Academic Performance Evaluation is conducted to determine progress on overall student achievement at the school as evidenced by the school's attainment of the contractual goals in the charter contract and the school's performance according to the state's accountability system – the North Star system. This evaluation is conducted annually and is designed to provide an update on the school's performance on contractual measures to date. In addition to the annual evaluations, a final academic performance evaluation is issued as part of the school's summative renewal evaluation in the last year of its charter contract.

For detailed information on the school's contractual goals, including performance rating criteria and World's Best Workforce alignment, refer to Exhibit G of the charter contract. All performance ratings presented in this evaluation are based upon currently available data. For comprehensive data by each performance measure, see the Academic Data Profile.

Summary of Indicator Points

Indicator	Points Possible	Points Earned	Performance Ranking	Percent Earned Through FY24	Percent Earned Through FY23
1: Mission Related Outcomes	8	9	Exceeds	113%	150.0%
2: English Language Learners	N/A	N/A	Not Applicable	N/A	N/A
3: Reading Growth	21	15.25	Approaches	73%	94.0%
4: Math Growth	21	14	Approaches	67%	88.1%
5: Reading Proficiency	18	0.5	Does Not Meet	3%	5.6%
6: Math Proficiency	18	0	Does Not Meet	0%	0.0%
7: Science Proficiency (and Growth)	10	0	Does Not Meet	0%	0.0%
8: Other Proficiency or Growth	N/A	N/A	Not Applicable	N/A	N/A
9: Post-Secondary Readiness	N/A	N/A	Not Applicable	N/A	N/A
10: Attendance	4	0	Does Not Meet	0%	50.0%
Overall	100	38.75	Candidate for Non-Renewal	39%	53.3%

**In line with Minnesota's ESSA waiver, and due to the effects of the COVID-19 pandemic on data collection and usability, MCA, ACCESS, and MTAS data collected during the 2020-21 school year will not be used for accountability purposes. To this end, Osprey Wilds will provide a FY21 academic evaluation to all schools, yet will use FY19 data to inform accountability decisions (i.e. renewal, etc.) until FY22 data becomes available. Furthermore, OW has determined to use FY21 data in aggregates only when it helps the school. Thus, in the FY24 evaluation OW will use results of an aggregate without FY21 as applicable. Comparison aggregates will use the same years included in the aggregate for the school.*

Summary Analysis: Three Rivers Montessori (TRM) demonstrated declining academic performance through the term of the contract. One indicator exceeded target (Mission Related Outcomes), two indicators met target (Reading Growth and Math Growth), and the remaining four indicators did not meet target (Reading Proficiency, Math Proficiency, Science Proficiency and Growth, and Attendance). The school maintained performance ranking levels for almost all indicators except one, with Attendance moving from Approaches to Does Not Meet.

Reading Growth and Math Growth are relative areas of strength for the school. North Star progress measures had poor results, with the school approaching target for one measure for the students whose achievement level improved on the statewide assessments for reading. All other North Star progress measures did not meet target. The school did well on local growth measures. For the years the school used the FastBridge assessment, the school met target with 57% of students in reading and 55% of students in math either being "Low Risk" or from fall to spring move from "High Risk" to "Some Risk" on the spring FastBridge assessment. For the year NWEA was in use, the school approached target for Reading and Math.

For Proficiency indicators, the school had poor performance. In all three indicators, only one measure earned any points. The Special Education student group in Reading approached target as they were within 10 points of the district's results. Every other measure did not meet target. It is critical that TRM focus diligently on monitoring student progress and supporting their skill development needs to accelerate academic growth as they work toward proficiency. The school should assess their program to ensure data feedback processes are in place, as well as effective interventions.

Other indicator areas were mixed in their performance. Mission Related Outcomes is a strength of the school, with the percentage of students scoring 'meets' or above on the Minnesota Executive Function Scale improved 10% annually from the baseline, which exceeded target. The school did poorly on Attendance, with the school's consistent attendance rate being 9 percentage points less than the district, which did not meet target.

It is important to note the context of this academic performance includes the impacts of the pandemic. The school earned 39% of possible points on the academic performance framework through the end of the contract term. Based on performance to date, the school is on track to be a "Candidate for Non-Renewal" per Exhibit P of the charter contract.

Indicator 1: Mission Related**8 Points****School Goal:** Over the period of the contract, students at Three Rivers Montessori (TRM) will develop their executive function skills and behaviors.

School Goal: Over the period of the contract, students at Three Rivers Montessori (TRM) will develop their executive function skills and behaviors.			Points	Result
Performance Ratings	Measure 1.1	From FY22-FY23, the percentage of students scoring 'meets' or above on the Minnesota Executive Function Scale will improve at least 4% annually from the baseline (FY21 - 67.6%).	6	10%
Exceeds Target (x 1.5)	The school's the percentage of students scoring 'meets' or above increased by at least 5% points annually.		X	9
Meets Target (x1.0)	The school's the percentage of students scoring 'meets' or above increased by at least 4% points annually.			
Approaches Target (x0.5)	The school's percentage of students scoring 'meets' or above was maintained from the baseline.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.			
			Points	Result
Performance Ratings	Measure 1.2	In FY24, the percentage of students scoring proficient ("quite often" or "all the time") on 3 or more survey* questions related to developing a holistic Montessori lens will be 80%, or will increase at least 30 percentage points from the Fall survey to the Spring survey	2	Unable to Score Due to Lack of Data Reported from School
Exceeds Target (x 1.5)	The aggregate percentage is at least 90%.			
Meets Target (x1.0)	The aggregate percentage is at least 80%.			
Approaches Target (x0.5)	The aggregate percentage is at least 70%.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.			
			Points Possible	Points Earned
			8	9
				% Earned
				112.5%

Analysis: The school had strong performance on Mission Related measures through the term of the contract. In aggregate, the percentage of students scoring 'meets' or above on the Minnesota Executive Function Scale improved 10% annually from the baseline, which exceeded target. The other measure was not able to be scored due to a lack of data being reported from the school.

Indicator 2: English Language Learners**0 Points****School Goal:** The school does not have a contractual goal in this indicator area as it does not serve a significant population of English Learners.**Indicator 3: Reading Growth****21 Points****School Goal:** Over the period of the contract, students at TRM will demonstrate growth in reading as measured by state accountability tests and nationally normed assessments.

School Goal: Over the period of the contract, students at NHA will demonstrate growth in reading as measured by state accountability tests and nationally normed assessments.			Points	Result	
Performance Ratings	Measure 3.1 [CCR]	In aggregate, from FY21 to FY23, the overall percentage of students whose achievement level on the statewide assessments for reading (as measured by North Star Academic Progress) improved on statewide assessments is equal to or greater than the state.	2.5	-9.8%	
Exceeds Target (x 1.5)	The school achieves an overall percentage greater than 10 percentage points over that of the state.				
Meets Target (x1.0)	The school achieves an overall percentage equal to or greater than that of the state.				
Approaches Target (x0.5)	The school achieves an overall percentage that is within 10 percentage points of the state.		X	1.25	
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.				
			Points	Result	
Performance Ratings	Measure 3.2 [CCR]	In aggregate, from FY21-FY23, the overall percentage of students whose achievement level decreased or stayed "does not meet standards" on statewide assessments for reading (as measured by North Star Academic Progress) is equal to or less than state.	2.5	41%	
Exceeds Target (x 1.5)	The school achieves an overall percentage at least 10 percentage points less than that of the state.				
Meets Target (x1.0)	The school achieves an overall percentage less than or equal to that of the state.				
Approaches Target (x0.5)	The school achieves an overall percentage that is no more than 10 percentage points greater than that of the state.				
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0	
			Points	Result	
Performance Ratings	Measure 3.3 [CCR]	From FY19-FY23, the combined aggregate percentage of students in grades 1-8 that are "Low Risk" on the spring FastBridge assessment OR from fall to spring move from "High Risk" to "Some Risk" will be at least 55%.	12	57%	
Exceeds Target (x 1.5)	The aggregate percentage of students' assessments categorized as "Low Risk" or moving from "High Risk" to "Some Risk" is at least [65 percent].				
Meets Target (x1.0)	The aggregate percentage of students' assessments categorized as "Low Risk" or moving from "High Risk" to "Some Risk" is at least [55 percent].		X	12	
Approaches Target (x0.5)	The aggregate percentage of students' assessments categorized as "Low Risk" or moving from "High Risk" to "Some Risk" is at least [45 percent].				
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.				
			Points	Result	
Performance Ratings	Measure 3.4 [CCR]	In FY24, the aggregate percentage of students in grades 1-6 who meet their expected growth target on the NWEA MAP assessment annually will be at least 50%.	4	44%	
Exceeds Target (x 1.5)	The aggregate percentage is at least 60%.				
Meets Target (x1.0)	The aggregate percentage is at least 50%.				
Approaches Target (x0.5)	The aggregate percentage is at least 40%.		X	2	
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.				
			Points Possible	Points Earned	% Earned
			21	15.25	73%

Analysis: The school demonstrated mixed Reading Growth performance through the term of the contract. North Star Progress measures did not meet target for either measure. Local growth outcomes, on the other hand, had stronger results. The school met target for the years it used FastBridge as an assessment, and approached target for the year it used NWEA. For FastBridge, 57% of students were either "low risk" or moved from "high risk" to "some risk" during the year, and for NWEA 44% of students meet their expected growth. Overall the school earned 73% of the points, which approaches target.

Indicator 4: Math Growth**21 Points****School Goal:** Over the period of the contract, students at TRM will demonstrate growth in math as measured by state accountability tests and nationally normed assessments.

Performance Ratings	Measure 4.1 [CCR]	In aggregate, from FY21 to FY23, the overall percentage of students whose achievement level on the statewide assessments for reading (as measured by North Star Academic Progress) improved on statewide assessments is equal to or greater than the state.	Points	Result
			2.5	-11%
Exceeds Target (x 1.5)	The school achieves an overall percentage greater than 10 percentage points over that of the state.			
Meets Target (x1.0)	The school achieves an overall percentage equal to or greater than that of the state.			14
Approaches Target (x0.5)	The school achieves an overall percentage that is within 10 percentage points of the state.			

Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 4.2 [CCR]	In aggregate, from FY21-FY23, the overall percentage of students whose achievement level decreased or stayed "does not meet standards" on statewide assessments for reading (as measured by North Star Academic Progress) is equal to or less than state.	2.5	42%
Exceeds Target (x 1.5)	The school achieves an overall percentage at least 10 percentage points less than that of the state.			
Meets Target (x1.0)	The school achieves an overall percentage less than or equal to that of the state.			
Approaches Target (x0.5)	The school achieves an overall percentage that is no more than 10 percentage points greater than that of the state.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 4.3 [CCR]	From FY19-FY23, the combined aggregate percentage of students in grades 1-8 that are "Low Risk" on the spring FastBridge assessment OR from fall to spring move from "High Risk" to "Some Risk" will be at least 55%.	12	55%
Exceeds Target (x 1.5)	The aggregate percentage of students' assessments categorized as "Low Risk" or moving from "High Risk" to "Some Risk" is at least [65 percent].			
Meets Target (x1.0)	The aggregate percentage of students' assessments categorized as "Low Risk" or moving from "High Risk" to "Some Risk" is at least [55 percent].		X	12
Approaches Target (x0.5)	The aggregate percentage of students' assessments categorized as "Low Risk" or moving from "High Risk" to "Some Risk" is at least [45 percent].			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.			
			Points	Result
Performance Ratings	Measure 4.4 [CCR]	In FY24, the aggregate percentage of students in grades 1-6 who meet their expected growth target on the NWEA MAP assessment annually will be at least 50%.	4	42%
Exceeds Target (x 1.5)	The aggregate percentage is at least 60%.			
Meets Target (x1.0)	The aggregate percentage is at least 50%.			
Approaches Target (x0.5)	The aggregate percentage is at least 40%.		X	2
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.			
			Points Possible	Points Earned
			21	14
				% Earned
				67%

Analysis: The school demonstrated mixed performance on Math Growth measures through the term of the contract. North Star Progress measures did not meet target for either measure. Local growth outcomes, on the other hand, had stronger results. The school met target for the years it used FastBridge as an assessment, and approached target for the year it used NWEA. For FastBridge, 55% of students were either "low risk" or moved from "high risk" to "some risk" during the year, and for NWEA 42% of students meet their expected growth. Overall the school earned 67% of the points, which approaches target.

Indicator 5: Reading Proficiency

18 Points

School Goal: Over the period of the contract, students at TRM will demonstrate proficiency in reading as measured by state accountability tests.				
			Points	Result
Performance Ratings	Measure 5.1 [RG3]	From FY19 to FY22, the school's aggregate proficiency index score for students in grade 3 will be greater than that of the state for the same grade.	1	-14
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the state's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the state's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the state's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 5.2 [RG3]	From FY19 to FY22, the school's aggregate proficiency index score for students in grade 3 will be greater than that of the resident district (ISD 728 – Elk River) for the same grade.	1	-27
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the district's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the district's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the district's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 5.3 [CCR]	From FY19 to FY22, the school's aggregate proficiency index score for all students (except grade 3) will be greater than that of the state for the same grades.	5	-27
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the state's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the state's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the state's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 5.4 [CCR]	From FY19 to FY22, the school's aggregate proficiency index score for all students (except grade 3) will be greater than that of the resident district (ISD 728 – Elk River) for the same grades.	5	-37
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the district's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the district's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the district's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 5.5 [AGC]	From FY19 to FY22, the school's aggregate proficiency index score for students in the Free/Reduced Priced Lunch group will be greater than that of the state for the same group and the same grades.	2	-29
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the state's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the state's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the state's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 5.6 [AGC]	From FY19 to FY22, the school's aggregate proficiency index score for students in the Free/Reduced Priced Lunch group will be greater than that of the resident district (ISD 728 – Elk River) for the same group and the same grades.	2	-44
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the district's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the district's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the district's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 5.7 [AGC]	From FY19 to FY22, the school's aggregate proficiency index score for students in the Special Education group will be greater than that of the state for the same group and the same grades.	1	-9
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the state's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the state's score.			15
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the state's score.		X	0.5

Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		Points	Result
Performance Ratings	Measure 5.8 [AGC]	From FY19 to FY22, the school's aggregate proficiency index score for students in the Special Education group will be greater than that of the resident district (ISD 728 – Elk River) for the same group and the same grades.	1	-18
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the district's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the district's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the district's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points Possible	Points Earned
			18	0.5
				% Earned
				2.8%

Analysis: The school had poor performance in Reading Proficiency through the term of the contract. They did not meet target on any measure in this indicator, performing well below the state and the district for all student groups. The school approached target on one measure, being within 10 points of the district for the Special Education student group.

Indicator 6: Math Proficiency

18 Points

School Goal: Over the period of the contract, students at TRM will demonstrate proficiency in math as measured by state accountability tests.				
			Points	Result
Performance Ratings	Measure 6.1 [CCR]	From FY19 to FY22, the school's aggregate proficiency index score will be greater than that of the state for the same grades.	6	-29
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the state's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the state's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the state's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 6.2 [CCR]	From FY19 to FY22, the school's aggregate proficiency index score will be greater than that of the resident district (ISD 728 – Elk River) for the same grades.	6	-43
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the district's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the district's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the district's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 6.3 [AGC]	From FY19 to FY22, the school's aggregate proficiency index score for students in the Free/Reduced Priced Lunch group will be greater than that of the state for the same group and the same grades.	2	-17
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the state's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the state's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the state's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 6.4 [AGC]	From FY19 to FY22, the school's aggregate proficiency index score for students in the Free/Reduced Priced Lunch group will be greater than that of the resident district (ISD 728 – Elk River) for the same group and the same grades.	2	-36
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the district's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the district's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the district's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 6.5 [AGC]	From FY19 to FY22, the school's aggregate proficiency index score for students in the Special Education group will be greater than that of the state for the same group and the same grades.	1	-16
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the state's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the state's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the state's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 6.6 [AGC]	From FY19 to FY22, the school's aggregate proficiency index score for students in the Special Education group will be greater than that of the resident district (ISD 728 – Elk River) for the same group and the same grades.	1	-26
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the district's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the district's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the district's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points Possible	Points Earned
			18	0
				% Earned
				0.0%

Analysis: The school had poor performance in Math Proficiency through the term of the contract. They did not meet target on any measure in this indicator, performing well below the state and the district for all student groups.

Indicator 7: Science Proficiency

10 Points

School Goal: Over the period of the contract, students at TRM will demonstrate proficiency in science as measured by state accountability tests and growth in science as measured by				
			Points	Result
Performance Ratings	Measure 7.1 [CCR]	From FY19 to FY22, the school's aggregate proficiency index score will be greater than that of the state for the same grades.	5	-12
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the state's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the state's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the state's score.			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.		X	0
			Points	Result
Performance Ratings	Measure 7.2 [CCR]	From FY19 to FY22, the school's aggregate proficiency index score will be greater than that of the resident district (ISD 728 – Elk River) for the same grades.	5	-20
Exceeds Target (x 1.5)	The school's aggregate proficiency index score is at least 10.0 points above the district's score.			
Meets Target (x1.0)	The school's aggregate proficiency index score is greater than the district's score.			
Approaches Target (x0.5)	The school's aggregate proficiency index score is within 10.0 points of the district's score.			
Elk River Middle School				16

Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.	X	0
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Points Possible	Points Earned	% Earned
10	0	0.0%

Analysis: The school had poor performance in Science Proficiency through the term of the contract. The school did not meet target for either measure, far underperforming the state and the district by 12 points and 20 points respectively.

Indicator 8: Proficiency in Other Curricular Areas

0 Points

School Goal: The school does not have a contractual goal in this optional indicator area.

Indicator 9: Post-Secondary Readiness

0 Points

School Goal: The school does not have a contractual goal in this indicator area as it does not serve high school students.

Indicator 10: Attendance

4 Points

School Goal: Over the period of the contract, students at TRM will attend the school at high rates.

		Points	Result
Performance Ratings	Measure 10.1	4	-9%
Exceeds Target (x 1.5)	From FY21 to FY24, the school's consistent attendance rate will be equal to or higher than the district.		
	The school's consistent attendance rate is at least 5.0 points above the district's rate.		
Meets Target (x1.0)	The school's consistent attendance rate is greater than the district's rate.		
	The school's consistent attendance rate is within 5.0 points of the district's rate.		
Approaches Target (x0.5)			
Does Not Meet Target (x0.0)	The school did not meet the criteria for any of the ratings above.	X	0
		Points Possible	Points Earned
		4	0
			% Earned
			0.0%

Analysis: The school demonstrated poor performance on the Attendance measure through the term of the contract. The school's consistent attendance rate was 9 percentage points lower than that of the district, which did not meet target.

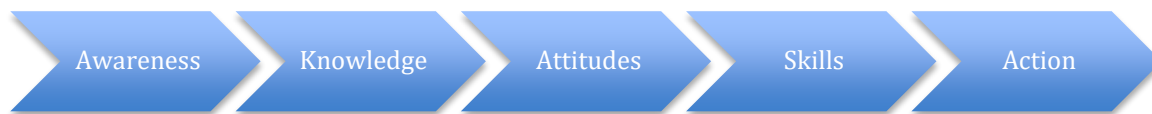
Three River Montessori

Environmental Education Performance Evaluation

Overview

The Osprey Wilds Environmental Learning Center defines environmental education as the implementation of values and strategies that foster learning and create environmentally literate people who engage in creating healthy outcomes for individuals, communities, and the Earth. The overarching goal of environmental education is an environmentally literate population. The test of environmental literacy is the capacity of an individual to work individually and collectively toward sustaining a healthy natural environment. An individual's capacity is built through developing awareness, knowledge, skills, and attitudes in support of sustaining a healthy planet where all people live in balance with the Earth.

The Environmental Evaluation (EE) Performance Framework was derived through a review of Osprey Wilds' charter contract, Minnesota's plan for environmental education, as well as the "Awareness to Action Continuum," identified in the Tbilisi Declaration (1977) and outlined below. The five components identified below are critical to the development of environmental literacy, but they are not mutually exclusive or necessarily sequential.



No single indicator describes the full picture of a school's environmental focus or performance on its EE-related goals. The performance areas are to be used together to indicate the total picture of the school's EE efforts. As appropriate, this evaluation should provide guidance for the school on areas of improvement.

This evaluation is informed by data from state assessments, data provided by the school, Osprey Wilds site visits to the school, interviews, and other information available to Osprey Wilds. Its purpose is to determine the strength and level of the school's overall environmental focus, as well as progress on contractual goals in the charter contract. Results of this evaluation become part of the body of information used to inform charter school renewal decisions made by the Osprey Wilds Board of Directors.

The Osprey Wilds Environmental Learning Center (Osprey Wilds), as part of the charter contracts with each school we authorize, evaluates each school's progress towards its environmental education (EE) related goals. Each school is required, as a condition of its contract, to provide opportunities to instill a connection and commitment to the environment through experiential learning. While environmental education is a pervasive educational strategy intended to permeate all curricular components, it is particularly useful in science learning and as a component of other curricula through hands-on, place-based learning activities.

Osprey Wilds' approach to measuring a school's commitment to and performance of environmental education is evolving. This evaluation framework reflects Osprey Wilds' current established guidelines for determining mission match; however, as the expectations and processes become more defined, the evaluation metrics will reflect that definition. Osprey Wilds will work closely with schools during their contract renewal period to clarify the expectations, goals, and reporting procedures.

Environmental Education Performance Indicators

The Environmental Education Performance Framework includes eight indicators, or general categories, used to evaluate a school's environmental education performance.

OUTCOMES	Indicator 1: Awareness	Students demonstrate an awareness of the relationship between the environment and human life and the diversity of life that shares the earth with humans.
	Indicator 2: Knowledge	Students have knowledge of how natural systems function and how human systems interact with and depend on them.
	Indicator 3: Attitudes	Students demonstrate respect and concern for the earth's health and the motivation to participate in environmental stewardship.
	Indicator 4: Skills	Students possess the skills needed to identify and critically analyze environmental issues, and to contribute to resolving the root of environmental challenges.
	Indicator 5: Action	Students have the capacity, or are increasing their capacity, to perceive and interpret the health of environmental and social systems and take appropriate action to maintain, restore, or improve the health of those systems.

Ratings

Each measure will receive one of three ratings based on evaluation of the established indicators. Again, no one measure identifies the full picture of a school's operational standing. The measures are to be used together to indicate the total strength of the school's EE program.

OUTCOMES:

Meets Standard

The school met its contractual goal and provided evidence of increasing environmental literacy among its students.

Approaches Standard

The school nearly met its contractual goal and provided evidence of emergent environmental literacy among its students.

Does Not Meet Standard

The school did not meet its contractual goal or did not provide evidence to demonstrate an emergent level of environmental literacy among its students.

Summary of Environmental Education Performance

Indicator		Rating
Outcomes	Indicator Area 1: Awareness	Meets Standard
	Indicator Area 2: Knowledge	Meets Standard
	Indicator Area 3: Attitudes	Meets Standard
	Indicator Area 4: Skills	Meets Standard
	Indicator Area 5: Action	Meets Standard

Summary

Over the term of the contract, students consistently achieved strong environmental literacy outcomes at Three Rivers Montessori (TRM). In addition to this being the school's first contract term, there was turnover in both the EE coordinator role and the instructional leadership at the school during years of the contract. Despite these transitions and some confusion around Osprey Wilds' expectations for EE, the school made intentional efforts to embed environmental education into core subjects and learning opportunities for students in line with its mission and model. TRM has found and leveraged the ready alignment between environmental education, the school's mission, and the Montessori philosophy to offer students hands-on, "cosmic" environmental learning activities. Students are given opportunities to invest in the natural environment around the school and engage with parents and families about environmental education.

EE Performance Indicator 1: Awareness

Standard:

Students demonstrate an awareness of the relationship between the environment and human life and the diversity of life that shares the earth with humans.

School Goal:

1. Students at TRM have the awareness, or are increasing their awareness, of the relationship between the environment and human life as measured by curriculum-based measures across the contract period.

Rating:

☒ **Meets Standard**

The school met its contractual goal and provided evidence of increasing environmental literacy among its students.

☐ **Approaches Standard**

The school nearly met its contractual goal and provided some evidence of environmental literacy among its students.

☐ **Does Not Meet Standard**

The school did not meet its contractual goal or provided insufficient evidence of environmental literacy among its students.

Data:

- All TRM students study the relationships between plants, animals and humans at varying degrees in the K/1, E1 and E2 classrooms. At the Kindergarten level students study how human beings and plants depend on each other by meeting each other's needs for oxygen and carbon dioxide. Children learn the parts of the plant and the function of each part as well as basic human needs. At the E1 level students explore how the earth provides natural resources used by humans such as wood, oil, coal and water which have been used for many years to provide warmth, electricity and transportation for humans. In the E2 classroom students explore more deeply the connection between humans and their environment as well as how these resources have been used throughout history for the advancement of civilizations. Students develop an appreciation for the ingenuity of their ancestors and a reverence for what the earth has provided.
 - At the K/1 level, 90% of students across two classrooms of K/1 students are able to correctly verbally identify and label the parts of the plant. To answer correctly, students will be able to say the part aloud to the teacher and place the correct label for each part.
 - 100% of students across two classrooms of K/1 students correctly verbally identified and labeled parts of the plant.

Analysis:

In the 23-24 school year, the school provided evidence that the target number of students successfully met the learning target for the strategy and evaluation method. The evidence from this indicator area demonstrates that students at TRM have or are increasing their awareness of the relationship between the environment and human life.

Each year of the contract term, the school earned a rating of Meets Standard in this indicator area. The annual EE performance data provided to Osprey Wilds during the term of the contract demonstrates that the school has systems in place to ensure student outcomes meet the learning targets outlined in Indicator 1, and therefore the school earns an overall rating of Meets Standard.

EE Performance Indicator 2: Knowledge

Standard:

Students have knowledge of how natural systems function and how human systems interact with and depend on them.

School Goal:

1. Students at TRM have the knowledge, or are increasing their knowledge, of human and natural systems and processes as measured by curriculum-based measures across the contract period.

Rating:

☒ **Meets Standard**

The school met its contractual goal and provided evidence of increasing environmental literacy among its students.

☐ **Approaches Standard**

The school nearly met its contractual goal and provided some evidence of environmental literacy among its students.

☐ **Does Not Meet Standard**

The school did not meet its contractual goal or provided insufficient evidence of environmental literacy among its students.

Data:

- Students in the 2nd/3rd classroom study the work of water on the earth. This begins by studying liquids (how liquids flow and how liquids take the shape of their container), then students study the parts of the river, how a river flows and finally construct their own model which illustrates erosion! Students label the parts and explain how erosion works by demonstrating layers of sediment with the model as a variety of colors of “sand” are washed down the river making deposits in the basin.
 - 90% of 2nd/3rd Grade students can correctly identify the parts of the river as presented as well as explain the process of erosion when asked by the teacher.
 - 100% of 2nd/3rd grade students correctly identified the parts of a river and explained the process of erosion to their classroom teacher.

Analysis:

In the 23-24 school year, the school provided evidence that greater than the target number of students successfully met the learning target for the strategy and evaluation method in this indicator area. This evidence demonstrates that students at TRM have or are increasing their knowledge of human and natural systems and processes.

Each year of the contract term, the school earned a rating of Meets or Approaches Standard in this indicator area, meeting standard in the final year of the contract term. The annual EE performance data provided to Osprey Wilds during the term of the contract demonstrates that the school has systems in place to ensure student outcomes meet the learning targets outlined in Indicator Area 2, and therefore the school earns an overall rating of Meets Standard.

EE Performance Indicator 3: Attitudes

Standard:

Students demonstrate respect and concern for the earth's health and the motivation to participate in environmental stewardship.

School Goal:

1. Students at TRM have an attitude, or are increasing their attitude of, appreciation and concern for the environment as measured by curriculum-based measures across the contract period.

Rating:

☒ **Meets Standard**

The school met its contractual goal and provided evidence of increasing environmental literacy among its students.

☐ **Approaches Standard**

The school nearly met its contractual goal and provided some evidence of environmental literacy among its students

☐ **Does Not Meet Standard**

The school did not meet its contractual goal or provided insufficient evidence of environmental literacy among its students.

Data:

- Students in the E2 Classrooms (Grades 4-6) will work to create a public service announcement of their choosing that they will represent to the E1 and K/1 students. The public service announcement will highlight the importance and impacts of recycling and/or use of sustainable practices in relation to their impacts on our local and global environments.
 - o 90% of the student projects will contain information that shows care and concern for the environment.
 - 100% of the grades 4-6 students created a public service announcement and presented this to our K/1 students

Analysis:

In the 23-24 school year, the school provided evidence that the target number of students successfully met the learning target for the strategy and evaluation method in this indicator area. This evidence demonstrates that students at TRM have an attitude, or are increasing their attitude of, appreciation and concern for the environment.

In all but one year of the contract term, the school earned a rating of Meets Standard. The annual EE performance data provided to Osprey Wilds during the term of the contract demonstrates that the school has systems in place to ensure student outcomes meet the learning targets outlined in Indicator Area 3, and therefore the school earns an overall rating of Meets Standard.

EE Performance Indicator 4: Skills

Standard:

Students possess the skills needed to identify and critically analyze environmental issues, and to contribute to resolving the root of environmental challenges.

School Goal:

1. Students at TRM have or are increasing their problem solving and critical thinking skills as it relates to the environment and human life as measured by curriculum-based measures across the contract period.

Rating:

☒ **Meets Standard**

The school met its contractual goal and provided evidence of increasing environmental literacy among its students.

☐ **Approaches Standard**

The school nearly met its contractual goal and provided some evidence of environmental literacy among its students.

☐ **Does Not Meet Standard**

The school did not meet its contractual goal or provided insufficient evidence of environmental literacy among its students.

Data:

- Students in the E1 (1-3) classes will research, plan, and build a solar oven. They will learn about the impact of Solar energy on the environment and how solar energy can be used in various ways. The project will culminate with a s'more cooking activity where they will use their solar ovens to cook a s'mores in the Spring sun.
 - 90% of E1 students will create a solar oven and be able to describe its impact on the environment as an alternative to electric consumption.
 - 100% of the students created a solar oven and described its impact on the environment.

Analysis:

In the 23-24 school year, the school provided evidence that the target number of students successfully met the learning target for the strategy and evaluation method in this indicator area. This evidence demonstrates that students at TRM have or are increasing their problem solving and critical thinking skills as it relates to the environment and human life.

In all but the first year of the contract term, the school earned a rating of Meets Standard in this indicator area. The annual EE performance data provided to Osprey Wilds during the term of the contract demonstrates that the school has systems in place to ensure student outcomes meet the learning targets outlined in Indicator Area 4, and therefore the school earns an overall rating of Meets Standard.

EE Performance Indicator 5: Action

Standard:

Students have the capacity, or are increasing their capacity, to perceive and interpret the health of environmental and social systems and take appropriate action to maintain, restore, or improve the health of those systems.

School Goal:

1. Students at TRM demonstrate the capacity, or are increasing their capacity, to work individually and collectively toward sustaining a healthy natural environment as measured by curriculum-based measures across the contract period.

Rating:

☒ **Meets Standard**

The school met its contractual goal and provided evidence of increasing environmental literacy among its students.

☐ **Approaches Standard**

The school nearly met its contractual goal and provided some evidence of environmental literacy among its students.

☐ **Does Not Meet Standard**

The school did not meet its contractual goal or provided insufficient evidence of environmental literacy among its students.

Data:

- Students in the E2 classrooms at TRM will participate in rainwater harvesting. Rain barrels will be set up on the school grounds and the E2 students will collect rainwater to use for our indoor plants and outside garden beds.
 - 90% of students will complete an exit ticket showing how they worked collectively to sustain a natural and healthy environment.
 - 100% of student participated in rainwater harvesting and completed a written narrative explaining how they collaborated to complete this project to sustain a healthy environment

Analysis:

In the 23-24 school year, the school provided evidence that the target number of students successfully met the learning target for the strategy and evaluation method in this indicator area. This evidence demonstrates that students at TRM demonstrate the capacity, or are increasing their capacity, to work individually and collectively toward sustaining a healthy natural environment.

In all but one of the years of the contract term, the school earned a rating of Meets Standard in this indicator area. The annual EE performance data provided to Osprey Wilds during the term of the contract demonstrates that the school has systems in place to ensure student outcomes meet the learning targets outlined in Indicator Area 5, and therefore the school earns an overall rating of Meets Standard.

Three Rivers Montessori

FY22-24 Financial Performance Evaluation

Contract term: July 1, 2018-June 30, 2025

Overview

The Financial Performance Evaluation is conducted to determine whether the school is compliant with legal requirements, the charter contract, and generally accepted principles of financial oversight and management, as well as to assess the financial health and viability of the school. This framework was derived through a review of model authorizer practices, charter school lender guidance, and expertise in the field. In completing the evaluation, Osprey Wilds has reviewed the school's financial audit, board meeting minutes, monthly financials, school policies, state reports, and other relevant documents. Unless otherwise noted, calculations are based on the school's most recent audited financial statements. In addition, the evaluation may incorporate information learned through site visits, attendance at board meetings, and interviews or discussions with key individuals at the school including the director, board chair, treasurer, and financial service provider. No one measure identifies the full picture of a school's financial situation. The measures are to be used together to indicate the total financial picture of the school.

Financial Performance Indicators

The Financial Performance Framework includes three indicators, or general categories, used to evaluate a school's financial performance.

1. Financial Management

This portion of the evaluation focuses on the school's performance relative to required financial management. Quality management and oversight of financials is a critical indicator of financial health. Schools that fail to meet the standards are not implementing best practices or those required by law or the charter contract and may be at greater risk for financial challenges in the present or future. This indicator includes the following measures: **Budgeting, Enrollment Variance, Financial Policies and Practices, Financial Reporting, and Financial Audit.**

2. Near-Term Financial Health

This portion of the evaluation tests a school's near term financial health and is designed to depict the school's financial position and viability in the coming year. Schools that fail to meet the standards may currently be experiencing financial difficulties and/or have a higher likelihood for financial hardship. These schools may require additional review and/or corrective action by Osprey Wilds. This indicator includes the following measures: **Current Ratio and Days Cash on Hand.**

3. Financial Sustainability

This portion of the evaluation includes longer-term financial sustainability measures and is designed to depict the school's financial position and viability over time. Schools that fail to meet the standards are more likely to face financial hardship in the future. This indicator includes the following measures: **Fund Balance Percentage, Total Margin and Aggregated Three-Year Total Margin, and Debt to Asset Ratio.**

Summary Discussion

Three Rivers Montessori (TRM) is in its first contract period. The school began serving students in Grades K-6 during the 2020-21 school year with the Montessori philosophy where the focus on education is for the whole being while providing the strongest possible academic foundation. The school received a federal Charter Schools Program (CSP) grant in FY19 that allowed the school to purchase curriculum materials, supplies, furniture, and technology to support students.

As a start-up, the school staff and board has so far demonstrated a commitment to strong budgeting and oversight of financials as well as development of necessary financial policies, many of which are required as part of the CSP grant. While TRM received the MDE School Finance Award in each of the last three years, indicating timely submission of financial data to the State and compliance with Minnesota statutes, it has been inconsistent over the course of the contract period with submitting documents to Osprey Wilds in a timely fashion. In addition, the school received a legal compliance finding in its 2023 audit due related to late payment of invoices that was repeated in FY24 with the addition of another finding for credit card internal controls. The school implemented a corrective action plan (CAP) to develop and implement policies and procedures related to the accounts payable cycle and training staff on financial procedures, but the issue may actually be in timing of cash flow rather than processes.

In December 2022, TRM discovered it was overpaid by MDE. The school was being paid on budgeted enrollment numbers that were not revised to actual with MDE. This put a financial strain on the school in the following months as those overpayments were corrected. Even with the help of receiving \$173k from the Employee Retention Credit (ERC) in FY23, staffing changes, improved financial reports and decreased use of outside vendors, that the school's lower-than-predicted enrollment affected everything, including the food service fund.

During FY23 and FY24, TRM experienced both challenges and successes. Key challenges included a shift in leadership, staff turnover, and further enrollment decline. Additionally, the school faced difficulties in communication and collaboration between general education and special education staff. Staffing changes affected the achievement of some original goals, with low enrollment being the most notable impact.

On the positive side, the school achieved several key successes. The board approved Montessori training for all staff, and classroom models were adjusted to foster peer learning, allowing younger students to learn from older peers who serve as role models. TRM also successfully renegotiated the terms of its lease, aligning the base rent for FY24 and FY25 with the school's lease aid, and extended the lease through 2026. Furthermore, the school's social media presence and marketing efforts have increased, and a change in third-party financial services has provided the staff and board with more accurate and realistic financial performance insights.

The board and school staff must carefully monitor its enrollment, budget, and financial position in order to avoid potentially falling into Statutory Operating Debt (SOD). In addition, the school must realistically plan for how it will increase its enrollment and re-build its fund balance in any future contract period to ensure it has sufficient reserves on hand to serve as a cushion for unexpected situations or to help fuel growth or investment in new programs.

Summary of Financial Performance

Financial Statements – Three-year Summary			
	2022	2023	2024
Balance Sheet			
Cash	\$100,237	\$172,312	\$78,232
Current Assets	\$547,491	\$364,682	\$370,849
Non-Current Assets	\$10,727	\$9,624	\$8,521
Total Assets	\$558,218	\$374,306	\$379,370
Current Liabilities	\$266,435	\$83,855	\$287,360
Non-Current Liabilities	\$0	\$0	\$125,000
Total Liabilities	\$266,435	\$83,855	\$412,360
Net Assets	\$291,783	\$290,451	-\$32,990
Income Statement (All Funds)			
Total Revenue	\$2,411,731	\$2,134,288	\$1,820,097
Total Expenditures	\$2,258,585	\$2,134,518	\$2,017,434
Debt Proceeds & Capital Leases	\$0	\$0	\$0
Surplus (Deficit)	\$153,146	-\$230	-\$197,337
Total Fund Balance	\$281,056	\$280,826	\$83,489
Total Unrestricted General Fund Balance	\$255,453	\$252,122	\$32,262
Enrollment Information – Pupil Units (P.U.)			
Budgeted Enrollment	164.00	173.00	167.00
Actual Enrollment	158.72	146.43	99.21
Maximum Total Enrollment (number of students) <i>Per section 6.5(a) of the charter contract</i>	220	220	220

Financial Performance Evaluation –Summary			
Management Indicators	2022	2023	2024
Budgeting	Meets	Meets	Meets
Enrollment Variance	96.8%	84.6%	59.4%
Financial Policies and Practices	Meets	Does Not Meet	Does Not Meet
Financial Reporting	Does Not Meet	Does Not Meet	Does Not Meet
Financial Audit	Meets	Meets	Does Not Meet
Near-Term Indicators			
Current Ratio	2.05	4.35	1.29
Days Cash on Hand	13	47	21
Sustainability Indicators			
Fund Balance Percentage	12.6%	13.3%	3.9%
Total Margin/Aggregated 3-Year Total Margin	6.4%/7.5%	0.0%/5.0%	-10.8%/-0.7%
Debt to Asset Ratio	0.48	0.22	1.09

Financial Performance Indicator 1: Financial Management

1.1 Budgeting: *Does the school effectively establish and monitor budgets?*

☒ **Meets Standard**

The school materially complies with applicable laws, rules, regulations and provisions of the charter contract relating to budgets.

- ☒ Board meeting minutes and/or audit notes document approval of fiscal year budget on or prior to the June 30 statutory deadline (MN Stat. §123B.77 Subd. 4).
- ☒ The board approves mid-year budget updates as necessary;
- ☒ At least monthly, the board reviews and approves quality financial statements in accordance with Section 6.9(a) of the charter contract, which include the following reports: budgeted and actual revenue and expenses by year-to-date percentages, disbursements and deposits, and student enrollment report with enrollment expressed in terms of funding mechanisms (e.g. Pupil Units);
- ☒ At least quarterly (for quarters ending 9/30, 12/31, 3/31, and 6/30), the board reviews and approves quality financial statements in accordance with Section 6.9(a) of the charter contract, which include the following reports: a balance sheet, income statement that includes revenues and expenses by UFARS programs (in accordance with Exhibit R of the contract), up-to-date cash flow projections, and fiscal year-end fund balance projections.
- ☒ Revenue and expenditure budget variances are within 5% of the February 1 approved budget.

The variance compares actuals to projected revenues and expenditures based on the school's approved budget as of February 1* for all fund areas.

*The intention is to compare year-end actuals to the approved budget in place on February 1. In lieu of that OW will compare to the most recent revised budget that is available. Please ensure Osprey Wilds has the school's most recent board-approved budget as of February 1 of each fiscal year. OW will not use working budgets for this calculation, only a board-approved budget.

☐ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Calculation

Revenue Variance = (Actual Revenue – Projected Revenue) ÷ Projected Revenue

-3.5% = (\$ 1,820,097 - \$ 1,887,008) ÷ \$ 1,887,008

Expenditure Variance = (Actual Expenditures – Projected Expenditures) ÷ Projected Expenditures

-2.8% = (\$ 2,017,434 - \$ 2,076,468) ÷ \$ 2,076,468

Analysis

Budget approval by statutory deadline. The TRM board approved the FY24 and FY25 budgets prior to the start of the respective fiscal years. Meeting minutes and OW board observations indicate evidence the board monitors the budget and circumstances, especially enrollment concerns that affect it throughout the year. Meeting minutes in prior years reflected a strong process leading up to final budget approval, however meeting minutes in FY24 document very little in the way of financial matters. The school also has a multi-year strategic plan with very clear financial goals.

Board review of financial statements. TRM's board has a very active Finance Committee that meets monthly and provides reports to the board, although minutes from those meetings or details of the reports are not included in the board packets which is recommended for transparency. In FY23 the school switched its third party financial provider and as a result the board started reviewing monthly full financial reports of a higher quality and with more consistency.

Budget variances. Budget to actual revenue and expenditure variances were reasonable based on the mid-year working budget. This revision was reflective of a more accurate enrollment number and from the new financial provider being able to produce more accurate and reasonable information with the details to back it up. TRM and its board are very aware of their financial situation and openly discuss it and monitor it. Throughout the year the board was very concerned about the fund balance and cash flow.

1.2 Enrollment Variance: *Does the school accurately project enrollment?*

The enrollment variance analysis will indicate whether the school is on target with enrollment projections from approved budgets and compares actuals to projected enrollment based on the school's originally approved budget. A school that fails to meet its enrollment targets may not be able to meet its budgeted expenses, and a poor enrollment variance is an important indicator of potential financial issues. Enrollment variance is used to evaluate a charter school's financial health as well as board and management capacity to forecast. Thus, while enrollment variance is a primary measure of financial health, it can also be seen as a secondary measure for organizational aptitude. Enrollment Variance is based on Per Pupil Units (PPU) as this is the primary driver of funding.

Calculation

Enrollment Variance = Actual Enrollment divided by Projected Enrollment
 $59.4\% = 99.21 \div 167$

☐ **Meets Standard:**

Enrollment Variance exceeds 95%.

☐ **Does Not Meet Standard:**

Enrollment Variance is between 85% and 95%.

☒ **Falls Far Below Standard:**

Enrollment Variance is less than 85%.

Analysis

TRM's enrollment variance for FY24 was 59.4%, failing to meet the standard for the past two years. The impact of COVID-19 has significantly affected enrollment, and numbers have yet to recover. However, the school remains optimistic about increasing enrollment through new marketing strategies and the addition of preschool students. It is crucial for school leadership and its board to closely monitor enrollment, adjust the budget as needed, and adopt a more cautious approach to future budgeting. Continued enrollment below projections could further impact the school's financial stability, particularly in covering lease costs.

As of FY25, the school is approximately 10 students below the budgeted enrollment, which was set at a more conservative 125 ADM. A mid-year budget revision is currently underway to address this shortfall.

1.3 Financial Policies and Practices: *Does the school implement appropriate financial policies and practices?*

☐ **Meets Standard**

The school materially complies with applicable laws, rules, regulations and provisions of the charter contract relating to financial policies and practices, including but not limited to:

- ☒ Procurement Policy (MN Stat. §124E.26)
- ☒ Fund Balance Policy (OW Contract, Exhibit P)
- ☒ Credit Card Policy (OW Contract, Exhibit P)
- ☒ Conflict of Interest Policy (MN Stat. §124E.14)
- ☒ Electronic Funds Transfer Policy (MN Stat. §471.38)
- ☒ Contributions and Fundraising Policy (OW Contract Section 6.13)
- ☒ Group Health Insurance Policy (required if the school provides group health insurance coverage) (MN Stat. §124E.12, Subd. 5(b))
- ☐ ~~Assessing Student Fees Policy (required if the school charges fees for textbooks, workbooks, and library books) (MN Stat. §123B.37)~~
- ☒ School Meals Policy (required if the school participates in the National School Lunch Program) (MN Stat. §124D.111 Subd. 1(a))
- ☐ The school has no audit findings related to appropriate use of public funds.*
- ☐ Evidence suggests the school has sufficient internal controls to prevent fraud, waste, and abuse.

☐ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

*Public entities, such as charter schools, must spend public funds for a public purpose. Minnesota law defines public funds as "all funds, regardless of source or purpose, held or administered by a government entity, unless otherwise restricted." (MN Stat. §118A.01 Subd. 4) Any funds in the school's bank accounts or processed by the school are public funds. This includes state and federal dollars as well as grant funds or individual donations. An expenditure serves the public purpose (and is an appropriate use of public funds) if it benefits the community as a whole, is directly related to the functions of the school, and does not have as its primary objective the benefit of private interest.

Analysis

The school has in place some appropriate financial policies and practices and some have been added to website as they have been updated. Review of check registers raise no immediate concerns regarding appropriate use of public funds. However, the legal compliance findings related to timely payment of invoices and credit card internal controls outlined within the audit states that "some disbursements contained late fees which is inappropriate use of public funds." Combined with the additional information provided in Indicator Area 1.4 below, this therefore does not meet standard.

Osprey Wilds has on file the following board approved financial-related policies:

- Procurement Policy, approved July 16, 2024
- Purchasing Policy, approved May 1, 2020
- Fund Balance Policy, approved March 19, 2024
- Credit Card Policy, revised November 21, 2023
- Conflict of Interest Policy, approved June 24, 2019
- Electronic Funds Transfer Policy, approved March 19, 2024
- Group Health Insurance Policy, revised December 19, 2023

- Unpaid Meals Policy, approved September 20, 2022

The school does not assess student fees for textbooks, workbooks, and library books and thus is not required to have this policy.

1.4 Financial Reporting: *Did the school complete timely and accurate financial reporting?*

☐ **Meets Standard**

The school materially complies with applicable laws, rules, regulations and provisions of the charter contract relating to financial reporting.

- ☒ Financial audit, including required supplemental information, is submitted to Osprey Wilds and MDE no later than the December 31 statutory deadline (MN Stat. §124E.16 Subd. 1(b)).
- ☒ Preliminary and final UFARS data are submitted on-time (September 15 and November 30 respectively).
- ☒ The school annually submits timely and accurate Average Daily Membership (ADM) estimates to MDE via ADM Web Estimates (ADMWE).
- ☒ CSP grant reports, SOD plans and reports and/or other required financial reports are submitted to MDE in a timely and accurate fashion.
- ☐ The school maintains an 80% on-time rate for financial reporting to Osprey Wilds via Aerie.*

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

*This includes the following tasks: Annual Budget, Financial Audit, IRS Form 990, Monthly Financial Statements, and Quarterly Financial Statements.

Analysis

TRM has struggled with financial reporting via Epicenter since it has become operational. Osprey Wilds has communicated the importance of submitting the requested documents in a timely manner but reporting in FY21 was only 43%, in FY22 was 0% and in FY23 was 60%. This is far below OW's expected compliance of 80% and therefore does not meet standard for this measure. (FY24 is excluded from the calculation due to challenges related to the Aerie implementation.) On a positive note however; TRM has received the School Finance Award for the last three years including in 2024 (for 2023 reporting).

1.5 Financial Audit: *Did the school receive an unqualified/unmodified audit opinion absent any significant deficiencies or material weaknesses?*

☐ **Meets Standard**

The school materially complies with applicable laws, rules, regulations and provisions of the charter contract relating to the annual financial audit.

- ☒ The most recent financial audit includes no significant deficiencies or material weaknesses.
- ☒ The most recent financial audit included an unqualified/unmodified opinion.
- ☐ Any previous year audit findings have not been repeated in most recent audit.
- ☒ Appropriate corrective action plan is in place to ensure any finding is not repeated in the next fiscal year.

- ☒ The audit report did not include a going concern disclosure in the notes or an explanatory paragraph within the audit report.

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Analysis

TRM's FY24 audit included an unmodified ("clean") opinion with no findings of a material weakness or significant deficiency. It did however include one legal compliance finding regarding the timely payment of invoices, a repeat finding from FY23. The audit also included a finding regarding Credit Card Internal Controls, where the school did not follow its own purchasing policy. Corrective Action Plans (CAP) are in place to review for the schools to review its procedures to determine if improvements can be made using the limited personnel available and to educate staff on existing policies and to have them followed more closely.

Financial Performance Indicator 2: Near-Term Financial Health

2.1 Current Ratio: *Does the school have enough current assets to pay off its current liabilities?*

The current ratio measures a school's ability to pay its obligations over the next 12 months. A current ratio of greater than 1.0 indicates that the school's current assets exceed its current liabilities, thus indicating ability to meet current obligations. A ratio of less than 1.0 indicates that the school does not have sufficient current assets to cover the current liabilities and is not in a satisfactory position to meet its financial obligations over the next 12 months.

Calculation

Current Ratio = Current Assets divided by Current Liabilities

$$1.29 = \$ 370,849 \div \$ 287,360$$

☒ **Meets Standard**

Current Ratio is greater than or equal to 1.1, or Current Ratio is between 1.0 and 1.1 and one-year trend is positive (current year ratio is higher than last year's).

☐ **Does Not Meet Standard**

Current Ratio is between 0.9 and 1.0 or equals 1.0, or Current Ratio is between 1.0 and 1.1 and one-year trend is negative.

☐ **Does Not Meet Standard**

Current Ratio is less than or equal to 0.9.

Analysis

TRM's current ratio for FY23 was 4.35, an increase from 2.05 in FY22 primarily due to the scheduled retirement of a lease payable. In FY24 however, the ratio fell to 1.29 primarily due to an outstanding balance of \$125,000 on a line of credit. Although this rate is above standard, the significant reduction highlights a potential weakening in the school's ability to meet its short-term obligations. This trend warrants close monitoring to ensure the school's financial stability does not deteriorate further.

2.2 Days Cash on Hand: *Does the school have sufficient cash on hand to fund operations?*

The days cash measure calculates the extent to which a school has sufficient cash to meet its cash obligations. Depreciation expense is removed from the total expenses because it is not a cash expense. This critical measure takes on additional importance given the timing of school payments in Minnesota. For this measure, target levels may be adjusted based on the holdback percentage to ensure reasonable expectations, while still evaluating a school for cash levels necessary for financial health. Measures below are based on the holdback rate of 10%.

December 31 data is also included to provide a fuller picture of the school's cash position throughout the year and is averaged with June 30. In addition, any short-term borrowing done by the school to manage cash flow will be documented here, though it will not figure into calculations. Short-term borrowing will also be evident in the Current Ratio.

Calculation

Days Cash = Cash divided by [(Total Expenses – Depreciation Expense)/365]

Previous fiscal year end (June 30):

14 days = \$ 78,232 ÷ [(\$ 2,276,621 – \$ 359,187) ÷ 365]

December 31 of previous fiscal year:

27 days = \$ 150,418 ÷ [(\$ 2,276,621 – \$ 359,187) ÷ 365]

21 days = Average days cash

Meets Standard:

- ☐ Average days cash is 60 or higher; or
- ☐ Average days cash is between 30 and 60 days and one-year trend is positive.

Does Not Meet Standard:

- ☒ Average days cash is between 15 and 30 days; or
- ☐ Average days cash is between 30 and 60 days and one-year trend is negative.

Falls Far Below Standard:

- ☐ Average days cash is less than 15 days cash.

Analysis

TRM's days cash on hand increased from 13 days in FY22 to 47 days in FY23. While this one-year trend appears positive, it is primarily due to the school having received a \$173k Employee Retention Credit (ERC), a literacy grant, and a special education tuition payment late in the year. However, in FY24 days cash on hand dropped to just 21 days, largely due to low enrollment, the high cost of the school's lease agreement, and increased costs for Montessori materials. To remain financially stable, the school faced difficult decisions, including significant budget cuts, staff layoffs, and accessing a line of credit (LOC).

Financial Performance Indicator 3: Financial Sustainability

3.1 Fund Balance Percentage: *Does the school have sufficient reserves on hand to serve as a cushion for unexpected situations or to help fuel growth or investment in new programs?*

The fund balance percentage measures the equity a school has built up in its general fund. Using the Fund Balance in the General Fund, this calculation indicates the percentage of available funds that the school has in reserve in relation to its Total General Fund Annual Expenditures.

Calculation

Fund Balance Percentage = General Fund Balance divided by Total General Fund Annual Expenditure

$$3.9\% = \$72,262 \div \$1,858,733$$

Meets Standard:

☐ Fund Balance Percentage is greater than or equal to 20.0%.

Does Not Meet Standard:

☐ Fund Balance Percentage is between 10.0-19.9%.

Falls Far Below Standard:

☒ Fund Balance Percentage is less than 9.9%.

Analysis

TRM ended its first operational year with a 12.2% fund balance and had slightly grown it to 13.3% in FY23. The School's projected net income for the year was \$101,337. This would have resulted in a projected cumulative fund balance of \$382,393 or 17.8% of expenditures. However, the new financial provider discovered two prior year errors, combined with slightly less enrollment than expected and losses in both the food and community service programs which resulted in a slight deficit of (\$230), leaving the total fund balances combined at \$280,827 or 13.3% of expenditures at fiscal year-end.

In FY24 the fund balance dropped to a critically low level of 3.9%. As stated in above indicators the school had to make significant adjustments to staffing and borrow funds to maintain operations.

Despite these challenges, TRM actively monitors its strategic goals and has a plan to achieve the required 20% fund balance by FY25, alongside efforts to increase enrollment. However, even with a projected net gain of nearly \$240k in the FY25 working budget, reaching this target remains unlikely due to continued low enrollment and high lease costs.

3.2 Total Margin and Aggregated Three-Year Total Margin: *Does the school operate with an annual surplus or has the school needed to deplete its fund balance to operate?*

The total margin measures whether a school added to its fund balance in a current year (positive total margin) or if the school depleted the fund balance in the current year (negative total margin).

The aggregated three-year total margin is helpful for measuring the long-term financial stability of the school by smoothing the impact of single-year fluctuations on the single-year total margin indicator. The performance of the school in the most recent year, however, is indicative of the sustainability of the school. It is expected that the school has a positive total margin in the most recent year, however in some instances, a school with a larger fund balance may have a planned spend down as part of a strategy to invest in some aspect of its program. Such instances will be noted in the analysis.

Calculation

Total Margin = Most recent year Surplus (or Deficit) divided by Total Revenue
 $-10.8\% = \$ -197,337 \div \$ 1,820,097$

Aggregated Three-Year Total Margin = Total Three-Year Surplus (or Deficit) divided by Total Three-Year Revenue
 $-0.7\% = \$ -44,421 \div \$ 6,366,116$

Meets Standard:

- ☐ Aggregated Three-Year Total Margin is positive and the most recent year Total Margin is positive; or
- ☐ Aggregated Three-Year Total Margin is greater than -1.5%, the trend is positive for the last two years, and the most recent year Total Margin is positive; or
- ☐ Aggregated Three-Year Total Margin is greater than -1.5%, the fund balance Meets Standard, and the school has executed a planned spending of its fund balance to invest in program needs.

Does Not Meet Standard:

- ☐ Aggregated Three-Year Total Margin is greater than -1.5%, but trend does not Meet Standard.

Falls Far Below Standard:

- ☐ Aggregated Three-Year Total Margin is less than or equal to -1.5%; or
- ☒ The most recent year Total Margin is less than -10.0%.

Analysis

TRM concluded FY24 with a total margin of -10.8%, down from 0.0% in FY23, 6.4% in FY22, and 10.9% in FY21. The three-year aggregate margin has also declined over the past four years, ending at -0.7% in FY24. This trend falls short of the standard and reflects the decreased fund balance percentage and reduced days cash on hand, as outlined in the indicators above.

3.3 Debt to Asset Ratio: *Does the school have sufficient resources to manage its debt?*

The debt to asset ratio compares the school's liabilities to its assets. Simply put, the ratio demonstrates what a school owes against what it owns. A lower debt to asset ratio generally indicates stronger financial health. Charter schools in Minnesota generally do not own buildings; therefore the assets are not recorded in the books of the school. However, beginning in FY23, lease accounting standards changed and charter schools are now required to recognize a lease liability and a corresponding intangible asset representing its "right to use" the asset. As a result, a school's financial statements can be materially impacted by this change in accounting methodology. The target levels are therefore set to reflect this impact.

In cases where a school has an affiliated building company, this measure does not take into account the building company's assets or liabilities. These calculations do not include any pension-related assets or liabilities (i.e. Teachers Retirement Association (TRA) and Public Employees Retirement

Association (PERA)) because these inclusions to audited financial statements do not bear on a school's financial viability or trends.

Calculation

Debt to Asset Ratio = Total Liabilities divided by Total Assets

$$1.09 = \$ 412,360 \div \$ 379,370$$

Meets Standard:

☐ Debt to Asset Ratio is less than or equal to 0.9

Does Not Meet Standard:

☐ Debt to Asset Ratio is greater than 0.9 but less than or equal to 1.0.

Falls Far Below Standard:

☒ Debt to Asset Ratio is greater than 1.0.

Analysis

TRM's debt to asset ratio remained relatively stable throughout the contract term, ending at 0.22 in FY23. However, in FY24, the ratio increased significantly to 1.09, primarily due to a \$125,000 balance on the line of credit (LOC), a higher amount of accounts payable at year-end, and an increased value of accrued salaries and benefits payable. It's important to note that this calculation does not include any long-term liabilities related to TRA and PERA.

Three Rivers Montessori Operations Performance Evaluation

Overview

The Operations Performance Evaluation is conducted not only to determine whether the school is compliant with legal requirements, the charter contract, and generally accepted principles of governance, oversight, and management, but also to assess the operational standing of the school. In completing this evaluation, Osprey Wilds has reviewed the school's board meeting minutes, school policies, state reports, compliance with Aerie tasks and deadlines, and other relevant documents and information. In addition, the evaluation will incorporate information learned through site visits, attendance at board meetings, and interviews or discussion with key individuals at the school including the director, board chair, teachers, or others. Results of this evaluation become part of the body of information used to inform charter school renewal decisions made by the board of directors of Osprey Wilds.

Operations Performance Indicators

The Operations Performance Framework includes six indicators, or general categories, used to evaluate a school's operations performance.

1. Educational Program

This portion of the evaluation focuses on how the school has implemented key components of the educational program. This indicator includes the following measures: **Mission & Vision, Instructional Practices, Curriculum, Assessment, Professional Development, Equity, Environmental Education Program, Educational Requirements, Special Education, English Learners, and Parent & Student Satisfaction.**

2. Governance

This portion of the evaluation focuses on the board's governance, oversight, and evaluation. This indicator includes the following measures: **Board Composition & Capacity, Board Decision-Making & Oversight, Management Accountability, and Environmental Education Oversight.**

3. School Environment

This portion of the evaluation focuses on the environment that the school has created for students. This indicator includes the following measures: **Facilities & Transportation, Health & Safety, and Sustainable Operations.**

4. Student Rights

This portion of the evaluation focuses on the practices and procedures of the school related to student enrollment and privacy rights. This indicator includes the following measures: **Admissions & Enrollment and Due Process & Privacy.**

5. Personnel Practices

This portion of the evaluation focuses on the school's practices and successes related to staffing. This indicator includes the following measures: **Licensure, Staff Retention and Employment Practices.**

6. Compliance & Reporting

This portion of the evaluation focuses on the school's ability to meet various authorizer and state compliance and reporting deadlines and activities. This indicator includes the following measures: **Charter School Annual Reports, Insurance and Authorizer & State Compliance.**

Operations Performance Evaluation Summary	
Indicator Area 1: Educational Program	
1.1: Mission & Vision	Approaches Standard
1.2: Instructional Practices	Approaches Standard
1.3: Curriculum	Approaches Standard
1.4: Assessment	Approaches Standard
1.5: Professional Development	Approaches Standard
1.6: Equity	Does Not Meet Standard
1.7: Environmental Education Program	Meets Standard
1.8: Educational Requirements	Does Not Meet Standard
1.9: Special Education	Does Not Meet Standard
1.10: English Learners	Does Not Meet Standard
1.11: Parent & Student Satisfaction	Does Not Meet Standard
Indicator Area 2: Governance	
2.1: Board Composition & Capacity	Does Not Meet Standard
2.2: Board Decision-Making & Oversight	Does Not Meet Standard
2.3: Management Accountability	Does Not Meet Standard
2.4: Environmental Education Oversight	Approaches Standard
Indicator Area 3: School Environment	
3.1: Facilities & Transportation	Meets Standard
3.2: Health & Safety	Does Not Meet Standard
3.3: Sustainable Operations	Approaches Standard
Indicator Area 4: Student Rights	
4.1: Admissions & Enrollment	Does Not Meet Standard
4.2: Due Process & Privacy	Meets Standard
Indicator Area 5: Personnel Practices	
5.1: Licensure	Meets Standard
5.2: Staff Retention	Does Not Meet Standard
5.3: Employment Practices	Does Not Meet Standard
Indicator Area 6: Compliance & Reporting	
6.1: Charter School Annual Reports	Does Not Meet Standard
6.2: Insurance	Does Not Meet Standard
6.3: Authorizer & State Compliance	Does Not Meet Standard

Operations Performance Indicator 1: Education Program

1.1 Mission & Vision: Does the school demonstrate fidelity to the mission and vision outlined in the contract?

☐ **Meets Standard**

The school implements programs that align to the mission and vision outlined in its current charter contract, including but not limited to:

- ☐ Implementation of statutory purposes
- ☒ Instructional program and curriculum, including key pedagogical approach, aligned to the mission and vision of the school
- ☒ Staffing levels and assignments aligned to the mission and vision of the school
- ☒ Stakeholders can identify the school mission
- ☒ Adapts environmental education in service of the school's mission and vision or to the needs and unique aspects of the school community.

☒ **Approaches Standard**

The school implements programs that align to the mission and vision outlined in its current charter contract, with one or more of the above elements developing or in need of improvement.

☐ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Exhibits D & F of the charter contract, family focus group data from site visits, Annual Report, school website, annual school survey data

Analysis:

The mission of Three Rivers Montessori (TRM) per the school's contract is, "Three Rivers Montessori empowers each student to reach their full potential as engaged citizens within their communities through caring for our planet and each other, bringing forth their gifts to meet the world's great need." The vision is, "Through the Montessori method of education and rich outdoor experiential education, Three Rivers Montessori School educates students to be curious and reflective, skilled and creative, empathic and compassionate." In the school's renewal application, it states that the updated mission of the school is, "Empowering students to reach their full potential through authentic Montessori learning," and the updated vision is, "Academic excellence, community engagement, and environmental stewardship." Because the mission and vision are part of the charter contract (Exhibit D), the school must negotiate a contract revision with Osprey Wilds if it plans to change its mission and vision. The contract retains the former mission and vision statement and therefore will be used for the purposes of this renewal.

Evidence from site visits, interviews, and document reviews indicate that TRM's instructional program and curriculum are aligned to the mission and vision of the school. There is clear commitment to the use of Montessori approaches and practices in order to fulfill the mission and vision outlined in Exhibit D. Additionally, TRM is appropriately staffed to implement an instructional program aligned to its mission and vision. While there is a mix of Montessori training completion among staff, there is a spirit of collaboration and mentorship to help support one another's gaps in specific pedagogical implementation. In interviews throughout the contract term, staff members identified their desire to learn more about Montessori instruction. The school has

made a variety of efforts to support teachers in developing their Montessori skills over the contract term, from having a Director of Teacher and Learning that is Montessori trained, to the current practice of a mentor teacher that provides feedback on Montessori implementation. Though the leadership transitions have impacted what this support has looked like, there has been a consistent recognition that support for Montessori implementation is needed and different solutions to meet this need. There is a clear commitment to the Montessori method at the school, and evidence of efforts to improve the instructional program in alignment with this pedagogical approach.

Regarding environmental education (EE), TRM struggled to keep sight of its missional alignment in this area as a result of leadership transitions in its first contract term. The description of the school's educational program in Exhibit D states that:

"Montessori Philosophy and environmentalism go hand-in-hand; therefore the school will align its objectives with those of Elk River as a GreenStep City since 2010, and with Audubon Center of the North Woods (sic), to instill a connection and commitment to the environment through experiential learning."

The school initially centered a mission, vision, and academic program that embedded environmental education seamlessly into the Montessori philosophy and academic program. Beyond that, the school planned to provide rich experiential learning opportunities to students. However, in the leadership transitions that took place throughout the term of the contract, the vision for how TRM might naturally align EE with the Montessori philosophy was lost, resulting in the creation of some environmental learning activities that were onerous on teachers and more difficult to implement. Students were given opportunities to develop environmental literacy through a Montessori lens throughout the term of the contract, though it was clear through discussions with the Executive Director, staff, and students, that the breadth and depth of that engagement fell short of the initial vision and for staff it often felt like an added burden, rather than a vital catalyst of the academic program. Due to a tight budget and staff turnover, field experiences were limited. While the school has had some struggles with consistently adapting environmental education to reflect the Montessorian school community, overall they have grown in this area throughout the term of the contract.

Stakeholders can identify the mission of the school. In interviews, parents described support of the Montessori mission and approach taken by the school. Similarly, students spoke positively about their learning experiences and the learning they accomplish in the Montessori environment. Both parents and students felt connected to the school, with parents stating that they could approach the school with any concerns, questions, or suggestions.

The primary purpose of TRM, per state statute, is "to improve the learning, achievement, and success of all students." TRM has had poor academic performance throughout the term of the contract. TRM earned 39% of the points available on the most recent academic performance evaluation, which does not meet standard. The school has had years of data showing growth, and years showing a decline. The school is in its first contract period, and earned 9% of points in FY21, 55% in FY22, 53% in FY23, and finally 39% in FY24. This indicates that the school is not improving the learning, achievement, and success of all students. It must be noted that this is the first contract period for the school, which had its first operational year in 2020 when COVID severely impacted all aspects of the education sector. The school has also had four Executive Directors during the last five years. Both of these factors have made stability in academic programming difficult to achieve. The main academic concerns are rooted in the core academic measures of proficiency, none of which met or approached standard, and growth, both of which approached standard.

The school's additional statutory purposes identified in Exhibit F of the charter contract are as follows:

- Increase learning opportunities for all pupils. Exhibit F says "Students will have access to city services such as the historical Grain Elevator and Oliver Kelley Farm, along with the city's trend towards a sustainability focus and implementation of environmental technologies. The students at TRM will have many opportunities to serve their community, through volunteerism at CAER, Habitat for Humanity, at the local nursing homes and assisted living community of Guardian Angels, as well as participating in neighborhood beautification efforts. A curriculum and school culture rooted deeply in sustainability, nonviolence, acceptance and respect will help children develop the skills necessary for living a peaceful life of passionate advocacy in the 21st century." A review of the school's Annual Reports and Renewal Application showed that the school did not report on progress related to this purpose as stated in Exhibit F. In these documents the school re-stated the importance of how the "Montessori method is focused on education for the whole being", but did not provide evidence of the school's progress in fulfilling the opportunities they outlined in Exhibit F. As such, TRM's progress toward this statutory purpose cannot be determined.
- Encourage the use of different and innovative teaching methods. In Exhibit F, the school describes the Montessori method as the school's way of encouraging the use of different and innovative teaching methods. A review of the school's Annual Reports and Renewal Application showed that the school did not report on progress related to this purpose as stated in Exhibit F. Instead, the school repeated the language from Exhibit F instead of providing an update on how it is fulfilling this purpose. Based on the observations, interviews, and document reviews over the course of the contract period, the school is making strides to support its teachers to implement the Montessori method. Montessori training, observations at Montessori schools, and ensuring Montessori-based instructional leadership is present within the school are all ways in which the school has made progress to encourage the use of different and innovative teaching methods. Overall, the school is meeting this additional purpose, though needs to ensure they are reporting on this and the other statutory purposes with fidelity.

Overall, the school approaches standard in demonstrating fidelity to the mission and vision outlined in the contract. This is based largely on academic performance over the course of the contract period.

1.2 Instructional Practices: Does the school implement instructional practices that focus on student achievement?

☐ **Meets Standard**

The school implements instructional practices focused on student achievement, with the following elements fully developed and functioning effectively:

- ☒ Instructional practices aligned with Exhibit D, Description of Educational Program, of the charter contract.
- ☒ Research-based instructional strategies and methodologies.
- ☐ Systematic processes for academic intervention, differentiation, and acceleration.
- ☐ Instructional planning processes.
- ☒ Instructional techniques to actively engage students and enhance learning.
- ☐ Instruction based on state standards.

☒ Classroom management that supports content delivery.

☒ **Approaches Standard**

The school implements instructional practices focused on student achievement, with one or more of the above elements developing or in need of improvement.

☐ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

n.b. The only way to merit a ratio of “meets standard” is to also receive 50% or more of the possible points on the Academic Performance Evaluation.

Data sources: Annual Report, classroom observations and staff interviews on site visits, renewal application, teacher evaluation policies and rubrics

Analysis:

Classroom observations, interviews with teachers and instructional leaders, and site visits indicate that Three Rivers Montessori has instructional practices generally aligned with its charter contract. The school uses a Montessori curriculum and materials to facilitate student learning. Support structures are in place to help teachers improve in their skills as a guide for students, grounded in Montessori principles. While there is a mix of educators with Montessori experience and training at the school, there is a clear intent and commitment to have the Montessori method at the center of the school’s educational program.

There is evidence of research-based instructional strategies and methodologies at the school. The Montessori method is a research-based instructional strategy, and there is a clear intention to establish Montessori practices throughout the classrooms. Observations throughout the contract period saw teachers pulling small groups consistently (a practice in alignment with the Montessori method), and there is evidence of differentiated learning during the work cycle. Interviews with staff indicate that the groups are created by level for different subjects and there are unique lessons for each.

There is no current tiered intervention plan or assigned curriculum to use for interventions. Each teacher was aware of differentiated support, but was not consistent in their methods of approach, nor system of documentation. The current Executive Director shared that they are working on systematizing their intervention process, which builds off of the work done by the previous Executive Director. While the Montessori method allows for some differentiation and acceleration within the method, it is critical that the school is able to identify which students have needs for additional support outside of the classroom environment. Prior to the next contract period, the school must create systematic processes for academic intervention, differentiation, and acceleration.

There is no systemic approach to instructional planning processes. For instance, while teachers shared a sense of collaboration between the E1 and E2 classrooms, there were no expectations for teachers to plan together. There is no evidence that any instructional leader at the school reviews lesson plans or provides consistent feedback on instructional practice. In the renewal site visit interview, the Executive Director shared that she is the primary instructional support and there is a mentor teacher who provides support for implementation of Montessori-specific materials, practices, and teaching methods. The school should clarify this role to provide clear expectations to

other teachers about how to incorporate feedback the Montessori mentor teacher provides. The Executive Director and mentor teacher should work together to communicate these expectations and reinforce them. These two instructional leaders should also articulate a clear approach to instructional planning and ongoing feedback for staff. Prior to the next contract period, the school must create a systemic approach to instructional planning processes.

The school has a number of programmatic elements that lend itself to engagement. While the effective implementation of these elements has been somewhat inconsistent, generally there is evidence the school has grown in its engagement of students and the Montessori principles that facilitate this within the classroom environment. The activities and methodology observed over the term of the contract showed some classrooms with good engagement from students, and some classrooms which felt a bit more distracted and there was less evidence of deep concentration and engagement in work. Generally, observations affirmed that children were able to meet their own needs and move around which indicated they felt safety and respect for one another. Observations early on in the contract term saw more struggles with engagement, especially in classrooms with teachers who were newer to the Montessori method. In general, appropriate classroom management and techniques embedded in the Montessori method that support student engagement were present and prioritized at the school.

TRM is developing its systems for instruction based on state standards. In interviews over the course of the contract term, teachers did not consistently understand whether or not their planning was aligned with state standards. They understood that they used the Montessori albums for their content and Montessori Compass for record keeping to track lessons that have been given to students and to make observations of student progress. Montessori Compass contains a scope and sequence for teachers to follow that is Common Core aligned, but has not been aligned to state standards. During the renewal site visit, teachers spoke to being excited to have Montessori Compass as a common tool to use and plan with. The school should build off of this momentum and take the next step to ensure that this tool is fully aligned with state standards.

The overall culture of the school felt orderly, caring, and supportive in classroom management. Observations throughout the contract term showed growth over the years, from less consistent management practices and sporadic school culture, to more consistency and a positive school culture. The most recent site visit showed most classrooms had individual learning occurring while the teacher was pulling groups and was able to stay in the group without disruptions. This is an indicator of strong classroom management that supports independence. The way the children were able to meet their own needs and move around also indicated they felt the safety and respect of one another which also is usually more prevalent in classrooms that have been normalized to the Montessori environment.

Overall, the school approaches standard in implementing instructional practices that focus on student achievement.

1.3 Curriculum: Does the school use a cohesive and comprehensive curriculum that promotes academic proficiency and growth for all students?

☐ **Meets Standard**

The school uses a standards-aligned curriculum and supporting materials for each grade, with the following elements fully developed and functioning effectively:

- ☒ Curriculum aligned with Exhibit D, Description of Educational Program, of the charter contract.
- ☐ Curriculum is evidence-based and aligned with state standards.
- ☒ School provides appropriate grade-level and content-specific curricular resources and materials.
- ☒ School defines horizontal and vertical alignment within and across grade levels and content areas.
- ☐ School communicates curricular expectations to staff.
- ☐ School has systems in place to ensure that curricular expectations are implemented with fidelity.
- ☐ Instructional staff understand and use curriculum documents and related materials to deliver instruction.
- ☐ Processes for reviewing and adjusting the curriculum based on student outcomes.

☒ **Approaches Standard**

The school uses a standards-aligned curriculum and supporting materials for each grade, with one or more of the above elements developing or in need of improvement.

☐ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: List of school-wide curricula, curriculum maps, pacing guides, professional development materials, classroom observations and staff interviews on site visits, assessment calendars, renewal application

Analysis:

The curriculum used in the classroom generally aligns with Exhibit D, which describes the practice of offering an authentic Montessori education. The school is using Montessori albums as a curriculum base, and uses Montessori Compass to track lessons and observations done with students. Montessori albums are essentially instruction manuals for Montessori materials that include the lessons to be given to students. The album content is the Montessori curriculum that teachers are expected to use. Not every teacher at TRM is Montessori trained, so there are areas of growth with regard to implementation of the method. There are some areas where non-Montessori worksheets and materials are brought in at each instructor's discretion, as well as some Montessori principles that are not fully formed. This includes key tenets of the Montessori structure, such as cosmic education and practical life. Most Montessori environments have these displayed or present in some way, though they have not been consistently present in the classrooms at TRM. It is clear, however, that the school's foundational curriculum materials are Montessori based and the school has taken strides to support teachers in its implementation over the term of the contract.

The curriculum is evidence-based, but not fully aligned with state standards. Montessori is a research-based curriculum, and ensures that the school is providing appropriate grade-level and content-specific curricular resources and materials. As discussed above in Section 1.2, the teachers use Montessori albums for their content and Montessori Compass for curriculum planning. These tools help ensure vertical alignment. While Montessori Compass is Common Core aligned, there is no systemic way that the school ensures any gaps in alignment between Common Core and Minnesota State Standards are being tracked and addressed (such as a curriculum map for the year). TRM lacks a clear system to ensure that available curricular materials are used with fidelity to teach standards, though the foundations are in place.

Curricular expectations and systems are emergent at the TRM. While the school has made progress in its clarity of communicating curricular expectations to staff, part of the issue has been inconsistent leadership during the last five years. As it stands, this year staff are expected to use the Montessori Compass reporting system in conjunction with the Montessori albums. The school has fluctuated how it tracks lessons and observations of students during the contract, using Transparent Classroom at one point then switching back to Montessori Compass. In this current school year, the school does not have a system in place to ensure that Montessori Compass and the albums are being implemented well and with fidelity. There is a mentor teacher in place to support teachers, but it is not clear if this position is supposed to ensure fidelity of curriculum implementation across all classrooms, and whether or not teachers are expected to implement her recommendations for improvement. It is also difficult to determine to what extent instructional staff understand and use curriculum documents and related materials to deliver instruction. This is due to the mix of Montessori experience among staff present at the school. Overall, the curriculum expectations in place at TRM are foundational, and need to be built upon to ensure implementation of the expectations are being done well.

Finally, while the staff feel comfortable accommodating the needs of their students in their own classrooms, schoolwide processes for reviewing and adjusting the curriculum based on student outcomes are still developing. Teachers hold collaborative meetings monthly (PLCs), and review data from assessments such as Fastbridge periodically. It is not clear what expectations exist related to adjusting instruction and curriculum based on student results, either on a micro level in the classroom or a macro level at the school. The school should establish practices to review and adjust the curriculum based on student outcomes, in ways that support teachers directly in the classroom and analyze overall what gaps exist in the curriculum as an educational program.

Prior to the next contract period, TRM must develop systems related to its curriculum in order to promote academic proficiency and growth for all students. This includes a way to ensure that available curricular materials are used with fidelity to teach state standards, clear curricular expectations that are then communicated to staff, and a curriculum review practice based on student outcomes.

Overall, the school approaches standard in using a cohesive and comprehensive curriculum that promotes academic proficiency and growth for all students.

1.4 Assessment: Does the school systematically collect, review, and use outcome-based data to improve student learning?

☐ **Meets Standard**

The school uses assessment data to promote academic proficiency and growth for all students, with the following elements fully developed and functioning effectively:

- ☒ Assessment administration practices align with Section 6.7, Methods of Student Assessment, and Exhibit G of the charter contract.
- ☐ Processes for routine data analysis inform curricular and instructional decisions.
- ☐ School uses assessment results to identify individual student needs and adjust instruction to improve academic proficiency and growth.

☒ **Approaches Standard**

The school uses assessment data to promote academic proficiency and growth for all students, with one or more of the above elements developing or in need of improvement.

☐ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Annual Report, site visit, academic data report, academic performance evaluation, assessment calendars

Analysis:

Data analysis is an emergent area for TRM. There are some systemic pieces in place to support data analysis, such as monthly PLC meetings and periodic data days. In interviews, however, teachers were not able to expand on how data analysis is used across the school to inform practice. It appears that through Montessori Compass they are able to record presentations and work, but there was not a clear understanding on how they created metrics or goals to make sure students are progressing. High fidelity Montessori environments use observations of the students as a form of data collection, in addition to periodic growth assessments such as Fastbridge. While teachers are making adjustments to instruction on an individual basis, there is not a unified understanding of how to do this consistently in the classroom nor a cohesive approach at the school level. The current Executive Director shared that she is eager to start a shift towards using more standardized data practices to analyze performance and inform instruction. While the beginnings of this shift have taken place, the school should formalize its processes for routine data analysis and ensure that teachers have training and support to use observations in the Montessori environment as actionable data as well.

1.5 Professional Development: Does the school implement a professional development program designed to improve the learning, achievement, and success of all students?

☐ **Meets Standard**

The school implements a program of professional development, including regular evaluation, with the following elements fully developed and functioning effectively:

- ☐ Primary goal of professional development is to improve student outcomes.
- ☐ School develops and implements a teacher evaluation and peer review process in accordance with MN Stat. §122A.40 Subd. 8 (b), clauses 2-13.
- ☐ Teacher evaluation process is implemented with consistency.
- ☒ School supports teachers to improve their instructional practice through interim accountability structures such as feedback, observations, mentoring, PLCs, etc.
- ☐ Professional development and training opportunities are responsive to students' academic performance.
- ☐ Staff and teachers receive appropriate training to increase students' environmental literacy.

☒ **Approaches Standard**

The school implements professional development and teacher evaluation, with one or more of the above elements developing or in need of improvement.

☐ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data Sources: Professional development agendas, school calendars, staff interviews on site visits, Annual Report, renewal evaluation, staff handbook

Analysis:

Three Rivers Montessori has had an inconsistent approach to professional development over the term of the contract. While development activities are taking place, there is no clear system that indicates that the primary goal of professional development is to improve student outcomes. A review of Annual Reports from the most recent years provides minimal evidence of any professional development activities taking place. For instance, the Staff Development section of the FY24 report states, “The Director of Teaching and Learning supported the professional growth of teachers during the 2023-2024 school year. In addition, teachers visited other Montessori schools in order to improve their practice.” This is the extent of the documentation of activities, or description of strategy behind the development that was selected. This year, the school’s development is solely focused on the required READ Act training, which is a huge commitment for teachers. During the renewal site visit, teachers shared they were able to request observations and mentorship from more veteran teachers. They also shared that the Executive Director was very hands on and happy to join them to support in the classroom. The school has also implemented a reading study focused on discipline within the Montessori setting. Overall, the school has been providing development to teachers and staff, though not in a cohesive way that is responsive to students’ academic performance.

The school has a teacher evaluation process in place that includes an observation rubric, a fall goal setting conversation, and two formal observations a year. There is some evidence from interviews with staff and school leadership throughout the contract term indicating that the reviews by administration took place regularly in the final three years of the contract term. There is no evidence that indicates the evaluation process was implemented in the first two years of the contract. Additionally, the evaluation process as submitted for the renewal, and as described in interviews, is not fully in alignment with current statutory requirements. By law, the teacher evaluation process must include (among other things):

- a three-year professional review cycle that includes an individual growth and development plan, a peer review process, at least one summative evaluation performed by a qualified and trained evaluator, and peer review in the years when the teacher does not receive a summative evaluation;
- uses student growth measures to determine 35% of teacher summative evaluation results;
- the teacher observation rubric includes culturally responsive methodologies;
- the model includes longitudinal data on student engagement and connection and other student outcome measures explicitly aligned with the elements of curriculum for which teachers are responsible, including academic literacy, oral academic language, and achievement of content areas of English learners.

Prior to any future contract period, the school must develop a teacher development and evaluation model that meets statutory requirements.

Professional development designed to equip teachers to increase students’ environmental literacy was developing and in need of improvement. Teachers were given an overview of the expectations for environmental education during annual pre-service training. Additional EE-related training was typically provided in-house through staff meetings about once a year. Due to leadership transitions

and budgetary constraints, the Executive Director served as the Environmental Education Coordinator which resulted in limited capacity to support teachers through EE-related professional development.

1.6 Equity: Does the school provide educational programming that engages students in ways that are culturally and linguistically appropriate, responsive, and relevant?

☐ **Meets Standard**

The school implements programs that provide equitable opportunities for all students in accordance with MN Stat. §120B.11 (Comprehensive Achievement and Civic Readiness) and MN Stat. §122A.40, including but not limited to:

- ☒ School supports teachers to establish positive, individual relationships with their students.
- ☒ School supports teachers to create meaningful and engaging connections between students' home and school lives.
- ☐ School supports teachers to learn about students' cultures in order to make purposeful connections to the curriculum.
- ☐ School supports students to develop positive ethnic and cultural identities while also helping them achieve academically.
- ☐ School helps teachers develop an awareness of their own cultural lens and the ways in which it might impact their teaching.
- ☐ School supports teachers to develop instructional practices and techniques that use cultural knowledge to make learning experiences more relevant and effective for students.
- ☐ Educational approach and instructional materials position students' languages, cultures, and identities as assets rather than barriers to learning.

☐ **Approaches Standard**

The school implements programs that provide equitable opportunities for students, with one or more of the above elements developing or in need of improvement.

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data Sources: Professional development agendas/offers, interviews on site visits, Annual Report, renewal evaluation, staff and family handbooks, facilities observations

Analysis:

TRM demonstrates some strengths in creating culturally and linguistically responsive educational programming, particularly in the areas of establishing positive relationships and making meaningful connections between students' home and school lives. Over the course of the contract, students consistently shared in interviews that they felt respected and supported by their teachers and enjoyed their time at school. Parents feel connected to the school community, and that they could approach the school with any concerns, questions, or suggestions.

The other areas of this section are in need of attention and growth by the school. There was no evidence of work on culture or identity work in the classrooms via decor, literature, materials etc. In student interviews the students were unable to identify how their identity or those of their

classmates was celebrated and shared in the classroom. There are many ways in which Montessori materials can lend to these types of conversations through language work or geography work.

In interviews during the renewal site visit, equity was a strong area of growth that the new Executive Director also identified. Teachers also shared that they felt this was an area of growth. One of the teachers interviewed shared that she was learning more on bias and identity in some of her renewal hours for PELSB, though this was in isolation and not school facilitated. The school is aware of the need to develop more equity grounded practices, with the Executive Director sharing there is opportunity for more exploration of culture and diversity within the school, as well as more culturally responsive materials in the classrooms. The school should ensure its plans includes training for staff to help them to learn about students' cultures in order to make purposeful connections to the curriculum, develop an awareness of their own cultural lens and the ways in which it might impact their teaching, and develop instructional practices and techniques that use cultural knowledge to make learning experiences more relevant and effective for students.

Overall, the school does not meet standard for this section. Prior to the next contract period, the school must develop a plan that ensures they are providing educational programming that engages students in ways that are culturally and linguistically appropriate, responsive, and relevant as described above.

1.7 Environmental Education Program: Does the school implement values and strategies that foster learning and create environmentally literate people who engage in creating healthy outcomes for individuals, communities, and the Earth?

☒ **Meets Standard**

The school implements values and strategies that foster learning and create environmentally literate people who engage in creating healthy outcomes for individuals, communities, and the Earth.

- ☒ The school employs environmental education as a strategy for teaching and learning within its science curriculum and at least one other discipline (e.g. language arts or physical education).

☐ **Approaches Standard**

The school employs environmental education as a strategy for teaching and learning within its science curriculum. Its application is not evident in other disciplines.

☐ **Does Not Meet Standard**

The school occasionally teaches concepts related directly to the natural environment but does not employ environmental education as a pervasive educational strategy for teaching and learning in any discipline.

Data sources: Site visits, Annual Reports, Environmental Literacy Plan data

Analysis:

The environmental education (EE) program was impacted by leadership transition during the contract term, but by the end of the 23-24 school year, the school demonstrated improvement in embedding EE across subjects, grades, and types of learning activities. The Montessori philosophy

and pedagogy lend themselves to an integrated approach to EE when implemented with that specific intention. According to the school's FY24 EE survey:

As a Montessori school, environmental education is integral to our teaching practices. Much of what we offer in our elementary education engages with each child's natural desire to understand and interact with the world around them. From the beginning of the school year, students are introduced to the stories of how the universe was created, what life looks like on earth, and how humans have interacted with the various environments they inhabit. We teach a reverence for living things and engage the students in hands-on learning experiences with understanding the environment and human impact on it in order to prepare them as stewards of the natural world.

Students are given opportunities to engage in the natural environment around the school and share with parents and families about environmental education. The environmental learning activities the school provides to students are presented in interdisciplinary ways, with an emphasis on reading and research related to local natural phenomena. Multi-age classrooms and opportunities to share learning with other students, in addition to recycling, are a reflection of school-wide investments in environmental education and sustainability.

1.8 Educational Requirements: Does the school comply with applicable educational requirements?

☐ **Meets Standard**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to education requirements, including but not limited to:

- ☒ School calendar meets state requirements.
- ☐ Graduation requirements meet state standards.
- ☒ School administers state assessments as required.
- ☐ Preschool / prekindergarten meets state requirements and contractual obligations (if applicable).
- ☒ Evidence suggests the school complies with requirements of Title or federal and state programs.

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: MDE report, Annual Report, school calendar, student / family handbook, annual assessment calendars, site visits, MDE Title reviews, school corrective action plans, Serious Testing Incidents identified during MDE's High-Quality Charter School identification process

Analysis:

Throughout the contract period, the school has consistently met state requirements for student instructional hours and has administered state assessments. In its response to this evaluation, the school indicated that it has decided not to continue its preschool program in the 2025-26 school year. However, for the remainder of the current contract period, the preschool program must maintain compliance with all applicable requirements.

The preschool program uses a Montessori curriculum, which is aligned with standards outlined on the Minnesota Parent Aware website. However, the program currently uses an internally developed

assessment tool that is not approved by Minnesota Parent Aware and does not align with the Early Childhood Indicators of Progress (ECIPs).

In its new school affidavit, TRM stated it would implement the High Scope Child Observation Record (COR), which is Parent Aware-approved for infant and toddler programs but not for preschool or pre-kindergarten. To meet compliance, the school must adopt a Minnesota Parent Aware-approved assessment tool and ensure it is implemented at both program entry and exit.

The program's current practices for health and developmental screenings are also insufficient. The school is required to conduct screenings within 90 days of enrollment or obtain a written conscientious objection from parents. Currently, the school only collects immunization records and does not gather the necessary screening information.

Additionally, the school lacks a kindergarten readiness goal in Exhibit G of its contract, which should be addressed and revised during the next contracting period. Furthermore, the preschool program is not included in the school's Educational Learning Plan (ELP), which also requires revision to align with program objectives and compliance standards.

1.9 Special Education: Does the school protect the rights of students with disabilities and comply with applicable requirements?

☐ **Meets Standard**

Consistent with the school's status and responsibilities as a Local Education Agency (LEA), the school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act) relating to the treatment of students with identified disabilities and those suspected of having a disability, including but not limited to:

- ☒ Identification and referral including evaluation of representation of groups (i.e., a Child Find screening is in place and the school adheres to this process)
- ☒ Operational compliance including the academic program, assessments, staffing and all other aspects of the school's program and responsibilities (i.e., school adheres to Special Education laws/IDEA and CAPs)
- ☒ Discipline, including due process protections, manifestation determinations, and behavioral intervention plans
- ☒ Carrying out Individual Education Plans and Section 504 plans
- ☒ Access to the school's facility and program to students and parents in a lawful manner and consistent with students' abilities
- ☒ Accommodations on assessments
- ☐ Securing all applicable funding
- ☒ School has a TSES manual
- ☐ Parent Advisory Council consists of at least half parents of students with a disability and meets no less than once a year in accordance with MN Stat. §125A.24

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Site visits, Annual Reports, TSES manual, MDE compliance reviews

Analysis:

Review of the TSES manual, interviews with teachers, the Executive Director, and the Special Education Director, site visits, and desk review of other data indicates that Three Rivers Montessori protects the rights of students with disabilities and complies with applicable requirements outlined above, with a few exceptions that are in progress as outlined below.

The school is not currently securing all applicable funding. The Special Education Director is intending to support the school to do third party billing.

The school did not have a Parent Advisory Council for every year of the contract. Prior to any future contract period, the school must form a Parent Advisory Council in alignment with MN Stat. §125A.25, and which meets at least once a year.

1.10 English Learners: Does the school protect the rights of English Learners (EL) and comply with applicable requirements?

☐ **Meets Standard**

Consistent with the school's status and responsibilities as a Local Education Agency (LEA), the school materially complies with applicable laws, rules, regulations, and provisions of the charter contract (including Title III of the Elementary and Secondary Education Act [ESEA] and U.S. Department of Education authorities) relating to English Learners (EL) requirements, including but not limited to:

- ☐ School has a Language Instruction Educational Program (LIEP) Plan.
- ☐ School has a Language Access Plan (starting in the 2025-26 school year).
- ☐ Evidence suggests the school complies with its LIEP Plan and applicable requirements.
- ☐ Enrollment packet includes the Minnesota Language Survey (MNLS).

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Site visits, Annual Reports, Minnesota Language Survey, LIEP Plan, student enrollment packet, Language Access Plan

Analysis:

Three Rivers Montessori (TRM) does not serve a significant population (at least 10 students) of English language learners as it only has a population of about 5% of students identified to receive English Learner services, which was five students in FY24.

The school's enrollment packet includes a section called Home Language Information. Parts of this survey are in alignment with the Minnesota Language Survey (MNLS), though it does not include everything on the MNLS. The school also has additional questions about student homelessness on the same page, which is not related to gathering language information. Prior to any future contract period, the school must update its enrollment packet to include the MNLS as is from the State.

The school has an English Language Learner Policy, which does not align with the requirements of a school's Language Instruction Educational Program (LIEP) Plan. Prior to any future contract period, the school must adopt a Language Instruction Educational Program (LIEP) Plan that complies with

the requirements of the Minnesota Department of Education. MDE has established procedures that must be used by all districts and charter schools in the identification, entrance and exit of English learners and English learners who are dually identified (English learners with disabilities).

Regarding implementation of the school's ELL services, the school's Renewal Application states (emphasis added), "If the parent(s)/guardian(s) note another language than English is spoken at home then the school team and parent will meet to determine additional needs the student may have. Services are provided accordingly through appropriate sources. TRM has four students identified as English Language Learners currently. *We have utilized out of field license permissions to implement programming for these students and implemented WIDA and ACCESS testing for each of these students as well...* TRM's plan of activities includes... *Professional development for teachers, administrators and staff to improve instruction for ELs.*" A review of submitted documents was unable to confirm which teachers have been providing EL services to students with an out of field permission, or what professional development took place during the contract term related to EL instruction.

In response to this evaluation, the school indicated it is working to update its LIEP plan and described its approach to supporting EL students. Specifically, it said that students identified for services this year are receiving, "additional programming in reading and math as needed through small group instruction with an interventionist. TRM's MTSS team regularly evaluates data and instructional practices for changes needed or for additional support needed." The school did not provide information on any professional development that teachers, administrators, and staff participated in to improve instruction for English language learners. Evidence suggests that the school is generally complying with its LIEP Plan and applicable requirements for this school year, but there is not enough evidence to speak to its consistency throughout the contract period and no evidence was submitted that confirmed any training took place for staff that was focused on improving instruction for English language learners.

1.11 Parent & Student Satisfaction: Are parents and students satisfied with the school's educational program?

☐ **Meets Standard**

Parent and students satisfaction data consistently documents a high degree of satisfaction with the school's educational program.

- ☐ School administers both parent and student satisfaction surveys annually.
- ☐ Evidence suggests there is a high degree of parents and students satisfied with the academic program of the school.

☐ **Approaches Standard**

Parent and students satisfaction data documents a moderate and/or inconsistent degree of satisfaction with the school's educational program.

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Student interviews and family focus group data from site visits, Annual Reports, survey data, classroom observations

Analysis:

Throughout the contract period, feedback from parents and students has offered valuable insights into the strengths and areas for improvement at TRM.

In SY 2020-2021, Kindergarten and 1st-grade students shared overwhelmingly positive feedback. They felt treated well by adults, supported by their teachers, and familiar with classroom rules, with 100% agreeing on these points. While most enjoyed learning and felt their progress was shared with families, a small percentage noted room for improvement in making learning consistently fun. Among 2nd-6th graders, the results were more mixed. Most believed their teachers supported their learning, but fewer students (67%) felt comfortable approaching them, and 65% found learning fun. Concerns also arose around safety and collaboration with peers. Parents, however, were very positive. They strongly agreed that the school followed Montessori principles, supported students equitably, and addressed their emotional and physical needs. Parents also praised the professionalism of the staff and strong communication from teachers.

In SY 2021-2022, no formal surveys were conducted for parents or students, but interviews during a site visit revealed positive student experiences. Students shared how much they appreciated being academically challenged and how welcoming the school community was. They mentioned that teachers made transitions to Montessori methods smooth and that their cultures were affirmed and valued.

For SY 2022-2023, a parent satisfaction survey provided mixed results. While nearly half of respondents were satisfied with academic programs and the Montessori approach, 40% found the academic experience unsatisfactory. Safety and security received more positive feedback, with two-thirds of parents satisfied. Volunteer opportunities and parent committee events were also rated favorably, but there were concerns about special education services and school policies. Unfortunately, no student survey was conducted that year.

In SY 2023-2024, the school also did not administer a parent or student satisfaction survey. However, during interviews with students, students spoke highly of their teachers and the variety of ways they could learn. They enjoyed having choices in their work, sharing their learning with parents, and participating in field trips and environmental activities. TRM engaged parents by asking about their interest in joining the parent committee. 75% expressed interest in joining a parent committee.

By SY 2024-2025, student feedback collected during renewal interviews continued to highlight a positive experience. Students enjoyed celebrations, academic challenges tailored to their abilities, and the supportive environment created by their teachers. Bullying was raised as a concern, primarily on the bus, but students felt the school addressed these issues effectively. They were mixed on whether they were learning about diversity, but overall, they appreciated how well their teachers knew and supported them.

Overall, there were varying levels of satisfaction among parents and students. However, TRM did not consistently administer satisfaction surveys throughout the contract period, making it difficult to fully gauge trends in satisfaction over time.

Operations Performance Indicator 2: Governance

2.1 Board Composition & Capacity: Does the school's board demonstrate the capacity to effectively govern a successful charter school?

☐ Meets Standard

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract and school bylaws relating to school board composition and training, and the board demonstrates the capacity to govern an effective charter school, with the following elements fully developed and functioning effectively:

- ☒ Board complies with applicable laws and its own bylaws with respect to board composition, including ex-officio (non-voting) members.
- ☒ Board conducts required background checks on all board members prior to being seated in accordance with Section 6.20 of the charter contract.
- ☐ Board members complete statutorily mandated initial and annual training.
- ☐ Board conducts an annual assessment of the training needs of individual members and the full board as required by statute.
- ☐ ~~Board conducts an annual assessment of the board's performance.~~
- ☐ Board elections are consistent with statute and bylaws.
- ☐ Officer elections are consistent with statute and bylaws.

☐ Approaches Standard

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the school board, however one or more of the above elements is developing or in need of improvement.

☒ Does Not Meet Standard

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Annual Report, school submissions to Aerie, board meeting minutes, Osprey Wilds site visits and board observations, school bylaws, board roster

Analysis:

Board Composition. Although the board has had significant board member transition over the course of its first contract period, Three Rivers Montessori has materially complied with applicable laws, rules, regulations, and provisions of the charter contract and school bylaws relating to school board composition. Article III, Section 3 of the TRM bylaws states, "The Board of Directors shall consist of not fewer than five (5) nor more than seven (7) unrelated Directors, excluding ex officio non-voting Directors, if any..." and "...provided that in no circumstance will teachers comprise a majority of the Board of Directors."

The school complies with these requirements, as well as statutory requirements governing parent, community, teacher, and ex-officio membership.

Background checks. At the beginning of the FY23 school year, the school received a Notice of Deficiency related to its background check practices. Since at least that time, TRM has consistently conducted background checks of its members in accordance with Section 6.20 of its charter contract.

Going forward, the board must consistently notify Osprey Wilds whether or not the background checks on board members contain adverse information for all members in accordance with Section 6.20 of the charter contract. Please note, if the background check did include adverse information, the school does not have to indicate what the finding was. However, OW staff may follow up to ensure the school appropriately minimizes any risks to student safety and public interests.

The August 9, 2022 Notice of Deficiency required:

The board must ensure that the school has obtained a background check on all staff, service providers, board members, and volunteers prior to that staff beginning service at the school. The board must develop a mechanism to determine, on at least an annual basis, if the background check policy has been implemented with fidelity and that no staff, service providers, board members, or volunteers began at the school without first obtaining and clearing a background check

The school established a process in which the Executive Director ensures background checks are completed and reports on a monthly basis to the board, or as staff are hired, on the status of background checks. All staff are entered into a spreadsheet and tracked notifying the date the background check was requested and the date it came back with notification of whether it was clear or if a finding impacts their specific role at TRM.

TRM documented this practice in the August 1, 2022 board meeting minutes. However, review of meeting minutes indicates that while the board is typically apprised of new hires, it is not informed of background check status. It is a violation of a potential employee's privacy to discuss any findings or adverse information but the board can certainly be told that a background check was completed prior to all staff, service providers, board members, and volunteers prior to beginning service at the school.

Please note, board action should be taken to approve all hiring for the school. For the Board's employees (i.e. Executive Director) this is an approval of the candidate for hiring. For all other employees this serves as an approval of an ongoing expense (liability) to the school. It is not an approval of the candidate. In TRM's case, it is also an opportunity to ensure that the school's emergent processes, such as background checks, are functioning properly.

Required initial and annual training. Review of the school's annual reports indicate that board members did not complete initial or annual training with fidelity. In FY21, the Annual Report indicates that only two members started in initial training, and it was not completed. Several members did not participate in annual training. In FY22, there is evidence that all members completed initial training, although at least three members had been serving on the board for over a year at that point. In FY23, at least one member reported no initial or annual training.

The FY24 Annual Report indicates that initial and annual training is complete for all members. However, some of this information appears to be incorrect. For example, the report states that one member participated in "What Boards Need to Know About Data Practices Law" and "What Boards Need to Know About Student Success, Achievement, and Performance" on August 1, 2023. While that was the date that Osprey Wilds offered initial board training, it did not offer these two sessions because they were not yet statutorily required. In addition, much of the training reported in the FY24 Annual Report was actually completed in FY25 (September 2024).

Annual assessment of training needs. In its response to this evaluation, the school submitted a “Board Self Reflection Policy” that was adopted on January 21, 2020 and revised on November 21, 2023. However, there is limited evidence in board meeting minutes that the board has implemented this policy with fidelity. In addition, the policy addresses “New board member orientation and training” but does not require an annual assessment of the training needs of individual members and the full board, or require annual training in response to that assessment.

Please note that beginning in 2024, MN Stat. §124E.07 Subd. 7 (d) requires:

Every charter school board member must complete annual training throughout the member's term based on an annual assessment of the training needs of individual members and the full board. Ongoing training includes but is not limited to budgeting, financial management, recruiting and hiring a charter school director or chief administrator, evaluating a charter school director or chief administrator, governance-management relationships, student support services, student discipline, state standards, cultural diversity, succession planning, strategic planning, program oversight and evaluation, compensation systems, human resources policies, effective parent and community relationships, authorizer contract and relationships, charter school law, legal liability, board recruitment and elections, board meetings and operations, policy development and review, and school health and safety.

The board should ensure that it completes an annual assessment of the training needs of individual members and the full board, and completes annual training in response to that assessment. In addition, charter school law now makes it clear that the charter school is responsible for covering the costs related to board training.

Assessment of board performance. Beginning in the 2024-25 school year, MN Stat. §124E.07 Subd. 7(g) requires, “The board must ensure that an annual assessment of the board's performance is conducted and the results are reported in the school's annual report.” The school may consider using the governance-related items in OW's operations and finance performance evaluation frameworks to conduct this assessment.

Board elections. TRM is in its first contract period. Although 2023 MN Stat. §124E.07 Subd. 2 states, “The ongoing board must be elected before the school completes its third year of operation,” the board held its first election on May 17, 2022 (at the end of its second operational year).

Please note, this statute has changed and 2024 MN Stat. §124E.07 Subd. 2 now requires, “The initial board must begin the transition to the ongoing board structure by the end of the first year of operation and complete the transition by the end of the second year of operation.”

TRM held its second election on May 16, 2023. The board set an election date for May 21, 2024 but did not receive any applicants so did not hold an election in FY24.

Both charter school law (MN Stat. §124E.07 Subd. 7 Subd. 5) and TRM's bylaws (Article III, Section 7) establish that, “...all parents or legal guardians of children enrolled in the school are the voters eligible to elect the members of the school's board of directors.” However, minutes from the April 18, 2023 board meeting state, “Each household gets 2 ballots...” One child or a group of siblings could very easily have more than two parents that are eligible voting members. (For example, three children who are siblings that share one parent but not the other could result in four eligible voters.) The board must ensure that all eligible voters are allowed to participate in board elections.

Officer elections. Article VIII of TRM’s bylaws states, “The officers of the Corporation shall consist of a Chair, Chair-elect, Secretary and Treasurer,” and “Terms of office shall be for one (1) year beginning July 1st in the year elected.” The board did not hold officer elections prior to holding board meeting elections at the end of the second operational year. It is unclear how officers were elected or appointed prior to that point because it is not documented in meeting minutes. In addition, the board did not elect a Chair-elect (i.e. vice chair) in any year of the contract period. The board held elections for Chair, Secretary, and Treasurer on May 17, 2022, June 20, 2023, and May 21, 2024.

Going forward, the board must hold annual officer elections in accordance with its bylaws.

2.2 Board Decision-Making & Oversight: Is the board engaged in appropriate decision-making and oversight through effective and transparent board meetings?

☐ **Meets Standard**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to board decision-making and oversight, with the following elements fully developed and functioning effectively:

- ☒ Meeting minutes include, at a minimum, the following:
 - Board member attendance;
 - Actions taken by the board, including specifics on any amendments;
 - Who made a motion and second; and
 - The result of the vote, including number of votes for and against if other than unanimous.
- ☐ Meetings are held consistent with Open Meeting Law
 - Meeting times and location are posted properly on the school website and/or onsite at the school, including for special or emergency meetings.
 - If meeting includes board member participation via interactive technology, it is done so consistent with MN Stat. §13D.02.
 - A quorum is present when the board meeting is convened.
 - One set of board materials is available for public inspection.
 - If meeting is closed, it is done so in accordance with MN Stat. 13D.05: agenda and minutes show statutory authority to close the meeting, and minutes appropriately summarize actions taken during the closed meeting (as required).
- ☐ The board reviews the school’s performance related to its contractual academic and academic-related goals (Exhibit G) at least four times per year.
- ☐ The board reviews the school’s performance related to its contractual environmental education goals (Exhibit H) and environmental literacy plan at least four times per year.
- ☐ The board monitors the school’s financial management, short-term financial sustainability, and long-term financial viability at each meeting.
- ☐ ~~The board reviews the school’s performance related to its Outstanding Obligations from the Previous Contract in Exhibit S of the charter contract at least four times per year (if applicable).~~
- ☐ The board takes appropriate action to ensure the school’s success based on its review of school performance.
- ☐ Required policies are in place and policies that must be approved or reviewed annually are addressed.

- ☐ Articles of Incorporation (Exhibit B) are compliant with statute and the charter contract.
- ☐ Bylaws (Exhibit C) are compliant with statute and the charter contract.
- ☒ The board reviews and approves or accepts key organizational documents (e.g. Annual Report, Financial Audit, Contract with Authorizer, and other Authorizer related documents).
- ☐ ~~The board ensures that the school's affiliated building company complies with all applicable legal requirements (if applicable).~~
- ☐ ~~The board ensures that the school's charter management organization (CMO) or education management organization (EMO) complies with all applicable legal requirements and contractual obligations (if applicable).~~

☐ **Approaches Standard**

The school materially complies with applicable laws, rules, regulations and provisions of the charter contract relating to the board decision-making and oversight, however one or more of the above elements is developing or in need of improvement.

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Board meeting minutes, Osprey Wilds board reviews and observations, and site visit interviews, director evaluation policy

Analysis:

Meeting minutes. Board meeting minutes are complete and include board member attendance, actions taken by the board, who made a motion and second, and the result of the vote, including number of votes for and against if other than unanimous. Minutes are presented clearly, generally cover the same key topics month to month, and contain summary information about reports. Minutes could be improved by including enough detail for a member of the public or OW evaluators to fully understand the board's deliberations and how board decisions were influenced by the content of the conversation. Throughout much of the contract term, the TRM board has used a recorder or clerk that does not serve on the board to take meeting minutes. This is an effective practice that allows the secretary to fully participate in board meetings while also ensuring that meetings are relatively well-documented.

Open Meeting Law. The TRM board generally complies with MN Stat. 13D, Open Meeting Law (OML), and a review of board meeting minutes over the term of the contract indicate very few violations. However, while the school was in its pre-operational period, OW issued a Notice of Concern ("NOC") (Intervention Level 1) on April 7, 2020 in accordance with Exhibit Q of the charter contract, related to the school's compliance with OML and the charter contract. Issues identified were related to notification of Osprey Wilds regarding special and emergency board meetings, submission of meeting minutes in a timely manner, holding virtual meetings during a health pandemic in accordance with statutory requirements, and complying with posting requirements for special and emergency board meetings.

As a result of the school's actions in response to the Notice of Concern and the demonstrated compliance with statute and the charter contract, OW closed the Notice of Concern on April 7, 2021.

At other times, the board struggled with closing meetings in accordance with the requirements of MN Open Meeting Law. For example, minutes from the August 15, 2023 meeting state:

Motion to approve: Chris motioned to move to closed Session in accordance with MN Stat. §13D.05 Subd. 3 to discuss closed meeting in accordance with MN Stat. §13D.05 Subd. 2 to discuss educational data, health data, medical data, welfare data, or mental health data that are not public data under section 13.32, 13.3805, subdivision 1, 13.384, or 13.46, subdivision 2 or 7 related to discrimination charges filed against the school with the US Equal Employment [Opportunity Commission]

This passage from the minutes cites two different sections of statute giving authority to close the meeting (MN Stat. §13D.05 Subd. 3 and MN Stat. §13D.05 Subd. 2) but specifically references the language from the latter (Subd. 2). It is not clear which, if either, of these statutes provides the board with authority to close the meeting. However, the “discrimination charges filed against the school with the US Equal Employment [Opportunity Commission]” were not related to “educational data.” Per MN Stat. §13.32 (emphasis added), “‘Educational data’ means data on individuals maintained by a public educational agency or institution or by a person acting for the agency or institution which relates to a student.” Because the charges were filed with the EEOC, they were regarding an employee rather than a student. It is possible that the meeting may have included discussion of an employee’s health data, medical data, welfare data, or mental health data; however, because the minutes do not accurately cite which section of statute is being used to close the meeting it is challenging for the reader to know if the meeting was closed appropriately and in accordance with statute.

Regular monitoring of contractual obligations. OW expects the TRM school board will monitor progress toward the goals and outcomes in the charter contract in the areas of Academics, Environmental Education, Finance, and Operations at least four times per year and document those discussions in the meeting minutes. Board meeting minutes indicate the board consistently reviews the school’s financial statements at board meetings. While the board regularly monitors the school’s financial activity, it is not clear that the board takes appropriate action to ensure the school’s success based on its review of school performance in this area.

There is evidence the board reviews academic data as it relates to contractual goals (Exhibit G) and progress toward contractual environmental education goals (Exhibit H) only occasionally. While the board receives updates on activities related to academics and environmental education somewhat regularly, those reports do not consistently include data comparing the school’s progress to the school’s contractual goals.

Because the school is in its first contract period, it does not have an Exhibit S (Outstanding Obligations from the Previous Contract) in its current contract. However, the school has received several notices of intervention over the course of the contract period, which is unusual for any school, let alone a school in its first operational period. The board has a responsibility to ensure that these interventions are appropriately and permanently resolved. Per Exhibit Q of the charter contract:

If Osprey Wilds has a concern about the School, or if the School fails to make adequate progress towards achieving its academic or environmental education goals or to meet financial requirements, or to comply with Applicable Law, or other requirements of this contract, Osprey Wilds shall determine the appropriate intervention. The interventions below need not be implemented sequentially, and Osprey Wilds will implement these as it sees fit and at its sole discretion.

As noted above, while the school was in its pre-operational period, OW issued a Notice of Concern for failure to comply with statutory requirements and contractual obligations relating to Open Meeting Law. (This was a first for OW as an authorizer as it had never before been required to intervene so early in a school's life cycle.) OW closed the NOC on March 7, 2021.

In FY21, the school's first operational year, OW issued a Notice of Deficiency ("NOD") (Intervention Level 2) for failure to comply with Exhibit J (Governance, Management, and Administration Plan) of the charter contract. It should be noted that this Notice of Deficiency was issued on August 20, 2020—prior to when the school began serving students. OW closed the NOD on March 2, 2021.

In FY22, the school's second operational year, OW issued a Notice of Concern on October 15, 2021 for failure to provide distance learning. OW closed this NOC on May 8, 2023.

In FY23, the school's third operational year, OW issued a Notice of Deficiency on August 8, 2022 regarding improper behavior by a TRM employee and failure of the school to address issues in a timely manner to protect students, failure to conduct criminal background checks prior to employment in violation of state law and school policy, and failure to provide a secure location for all students in a lockdown drill. As a result of the school's actions in response to the Notice of Deficiency and the demonstrated compliance with statute, the charter contract, and its own policy regarding background checks, OW closed the Notice of Deficiency on November 30, 2023.

In addition to ensuring that interventions are resolved, the board must ensure proper oversight so that intervention by the authorizer is not warranted. Exhibit J of the charter contract states:

The School Board of Directors shall demonstrate governance practices of a viable organization as measured by indicators including but not limited to: ongoing training for the Board of Directors, proper oversight by the Board of Directors, active participation by members of the Board of Directors, adopting of required policies, self-evaluation, evaluation of the school administrator(s) and other indicators identified in Osprey Wilds performance evaluations.

In any future contract period, it will be extremely important that the TRM Board of Directors ensure it is fulfilling its contractual obligations and fiduciary responsibilities.

Required policies. OW reviewed the board policies on file and posted on the TRM website. The school is missing the following required policies or has not submitted them to Osprey Wilds:

- School Cell Phone Policy
- Student Journalist Policy
- Library Materials Policy
- Records Retention Schedule
- Title IX Policy
- Language Instruction Educational Program (LIEP) Plan
- Comprehensive Achievement and Civic Readiness (CACR) Strategic Plan (formerly the World's Best Workforce Strategic Plan)

The school must adopt the required policies as soon as possible or prior to any future contract period, no later than June 30, 2025.

In addition, review of policies identified several that must be revised to bring them into compliance with recent statutory changes. Please review the following policies and revise to ensure compliance with state law prior to any future contract period:

- Public Data Access Policy
- Data Subject Rights and Access Policy
- Nepotism Policy
- Admission Policies & Procedures (including the Lottery Policy and Early K/1 Admission Policy)
- Personnel Policies (i.e. Employee / Staff Handbook)

Additional notes about required changes to these policies can be found on the school's 24-25 Compliance Spreadsheet on Google Drive.

For all schools in renewal in 2024 and going forward, Osprey Wilds requires schools to adopt grievance procedures. The school may want to begin working on developing this policy and practices. The contract language reads:

The School shall adopt and publish grievance procedures ("Grievance Procedures") for the prompt and equitable resolution of complaints. Osprey Wilds should not be listed as a party to receive complaints in the Grievance Procedures. The Grievance Procedures should be published, without limitation, on the School website, in the School's staff handbook, and in the School's student and/or family handbook.

Finally, the school's bylaws are out of compliance with statute. The board must revise the bylaws to comply with statute and the charter contract prior to any future contract period.

2.3 Management Accountability: Does the board hold management accountable for clear and measurable outcomes?

☒ **Meets Standard**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to holding management accountable for reaching performance targets, including but not limited to:

- ☒ Board establishes qualifications for all persons who hold administrative, academic supervision, or instructional leadership roles in accordance with MN Stat. §124E.12 Subd. 2(a).
- ☒ Board establishes a formal performance evaluation process for the school leader or EMO/CMO in accordance with MN Stat. §124E.07 Subd. 6.
- ☐ Board implements a formal performance evaluation process for the school leader or EMO/CMO in accordance with MN Stat. §124E.12 Subd. 2(a).
- ☐ School leaders who do not hold a valid administrative license annually develop, implement, and report on a professional development plan approved by the charter school board of directors in accordance with MN Stat. §124E.12 Subd. 2(b) (if applicable).
- ☐ ~~School leaders who do not hold a valid administrative license annually complete a minimum of 25 hours of competency-based training corresponding to the professional development plan approved by the charter school board of directors in accordance with MN Stat. §124E.12 Subd. 2(b) (if applicable).~~
- ☐ School leader performance evaluation process evaluates performance in relation to OW contractual academic and environmental education goals and expectations.

- ☐ Board engages in periodic school leadership evaluation activities throughout the school year (at least four times per year) as documented by board meeting minutes.

☐ **Approaches Standard**

The school materially complies with applicable laws, rules, regulations and provisions of the charter contract relating to management accountability, however one or more of the above elements is developing or in need of improvement.

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Board meeting minutes, Osprey Wilds board review and observations, Osprey Wilds site visit interviews, renewal application

Analysis:

The TRM Board has established qualifications for the Executive Director in accordance with MN Stat. §124E.12 Subd. 2(a). At the time of this evaluation, this is the only person who holds an administrative, academic supervision, or instructional leadership role.

TRM requires its Executive Director hold a valid Minnesota teaching license and a bachelor's degree in education. (An administrative license or master's degree in education are desired qualifications.) 2024 MN Stat. §124E.12 (a) requires that the qualifications must include a requirement that a person hold a minimum of a four-year degree from an accredited institution or equivalent experience. Per law, other qualifications for these positions shall include, as appropriate for the specific position: instruction and assessment, curriculum design, human resource and personnel management, professional ethics, child development, financial management, legal and compliance management, special education oversight, contract management, effective communication, cultural competency, board and authorizer relationships, parent relationships, and community partnerships.

Please note that the "Essential Qualifications" and "Desired Qualifications" identified in the "School Director Succession Policy" (approved by the board on January 21, 2020) differ from the 2024-25 Executive Director job posting. (Both require at least a four-year degree.)

Paula Henry, the school's current Executive Director, holds multiple administrative licenses (District Superintendent and Principal K-12) that are valid through June 30, 2026. The school's former Executive Director (who held the role for the prior two years of the contract period) also held an administrative license (Principal K-12), which is valid through 2027. The school's leaders in its first two years were not licensed administrators. In its FY21 Annual Report, the school reported on implementation of the Executive Director's professional development plan. However, it did not include this information in the FY22 Annual Report.

The TRM board has established a detailed Director Performance Evaluation Policy (approved January 17, 2020) that outlines activities associated with the annual evaluation cycle, persons responsible for each activity, and a clear timeline for implementation. Meeting minutes indicate the TRM conducted director performance evaluations at meetings in FY23 (April 18, 2023) and FY24 (April 16, 2024 and May 21, 2024).

However, it does not appear that the board carries out the process described in policy with fidelity. Minutes from the September 21, 2021 board meeting indicate the board approved, "...the executive director review process made by Hannah." It is unclear if this is different from the process outlined in policy and board approved in January 2020. At its meeting on January 17, 2023, the board again discussed the Executive Director review process. Minutes provide the following summary of the discussion:

Solidify a process for Executive Director review, Chris suggested leveraging our relationship with Kara Sime, contracted HR rep from Designs for Learning, it may be helpful to use this resource to get the review process for the school leader started. Chris is hoping to implement a staff input and staff review to get check ins from staff on the ground, once or twice a year possibly. Kara may have steps laid out for all of this to make it straight forward. Board might want to designate a committee to oversee this process and recommend the completed draft to the board. Thoughts? Tim asked who Kara is, and Chris clarified she is our contracted HR rep. Worked with her on the ED hire process as well. Have reached out for templates and other ideas and not much out there. A process to help and support the ED, how do we help and offer resources for the leader to reach the goals of the school.

It appears that at least some of what was discussed at the January 2023 meeting, such as using data collected from staff and board members in conjunction with personal reflection to inform the performance evaluation, was already included in the policy approved in January 2020.

OW expects that the board engages in periodic school leadership evaluation activities throughout the school year (at least four times per year) as documented by board meeting minutes. This work at TRM may be carried out by a committee but, if so, it was not documented in board meeting minutes. During any subsequent contract periods, the board should ensure that meeting minutes thoroughly document obligations such as school leader evaluation, as board meeting minutes are the official record of the board's work and the primary data source that OW uses to determine compliance with this and other requirements.

TRM's Director Performance Evaluation Policy does not hold the school leader accountable in relation to the academic and environmental education goals or other expectations in its contract with Osprey Wilds. This is also a requirement of statute. MN §124E.07 Subd. 6 states, "The board shall adopt personnel evaluation policies and practices that, at a minimum...evaluate how charter contract goals and commitments are executed..."

The board should consider how effective its review process is at measuring the aspects of the school leader's performance that have the most impact on students' (and the school's) futures. Per MN §124E.01, "The primary purpose of charter schools is to improve the learning, achievement, and success of all students" and, per Exhibit P of the school's contract, "Charter renewal will be based primarily on a school's attainment of its academic and academic-related goals identified in Exhibit G, which is evaluated according to Osprey Wilds' Academic Performance Framework." Because the long-term viability of the school depends on fulfilling the primary purpose of charters and meeting the goals set out in the contract, regular and thorough attention to academic and environmental education outcomes is warranted, including in the expectations set for the school leader.

2.4 Environmental Education Oversight: Does the board of directors allocate the appropriate financial, human, and organizational resources to carry out environmental education and monitors the school's progress toward its goals?

☐ **Meets Standard**

Board governance results in quality environmental literacy outcomes for students, including but not limited to:

- ☐ Board ensures long-term strategic or organizational planning includes environmental education (if applicable).
- ☒ Board allocates appropriate resources, such as funding and staffing, to implement an environmental education program.
- ☐ Board ensures the organization fulfills contractual obligations related to Exhibit H and the environmental literacy plan.
- ☐ Board holds the school's operational decision-makers accountable for sustainable operations.
- ☒ The school has systems in place to track its progress toward increasing student environmental literacy.

☐ **Approaches Standard**

The board of directors allocate the appropriate financial, human, and organizational resources to carry out environmental education, with one or more of the above elements developing or in need of improvement.

☐ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Board meeting minutes, board meeting observations, site visit interviews, annual budget, renewal evaluation, Environmental Literacy Plan (ELP) survey

Analysis:

The EE data reported annually from TRM in conjunction with observational data and annual reports demonstrate that the school has an articulated commitment to EE principles and practices. However, the evidence of school board engagement and leadership regarding environmental education is lacking. Osprey Wilds expects that school boards review the school's progress toward its environmental literacy goals at least quarterly at board meetings, which has not been evident in TRM board meeting minutes. Accountability for progress toward the EE goals is not only a responsibility of the school board, it is also an opportunity for the board members to lend curiosity, enthusiasm, and leverage their networks in support of the school's commitment to fostering student connection to nature in alignment with the Montessori philosophy and the school's Exhibit D: Description of Educational Programs.

Staff have the resources to implement and track the progress of the EE program, but resources to fund regular EE-related field experiences for students or EE-related teacher training have not been feasible for the school. Since FY21 the school has not reported on the environmental education program in its Annual Report (a practice Osprey Wilds recommends in the annual report guidance it disseminates each year), and environmental education is not a core component of the school's long-term strategic or organizational planning. Similarly, while the school has pursued some

sustainable operations and practices, the initiative and accountability has come from dedicated staff rather than the board.

Operations Indicator 3: School Environment

3.1 Facilities & Transportation: Do the school's facilities and transportation practices effectively serve students?

☒ **Meets Standard**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the school facilities, grounds and transportation, including but not limited to:

- ☒ Fire inspections and records are maintained.
- ☒ Certificate of occupancy is on file.
- ☒ School has a plan for transportation services.
- ☒ Evidence suggests the physical space is safe.

☐ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Site visits, Annual Report, lease aid application

3.2 Health & Safety: Is the school an effective steward of the health and safety of all students?

☐ **Meets Standard**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to health and safety, including but not limited to:

- ☒ Crisis Management Policy is aligned to MN §121A.035, Subd. 2.
- ☐ The school annually conducts at least five school lock-down drills, five school fire drills consistent with MN Stat. §299F.30, and one tornado drill in accordance with MN §121A.035, Subd. 2.
- ☒ School complies with MDE food and nutrition program requirements.
- ☒ School has a plan for nursing services and dispensing pharmaceuticals.
- ☒ School provides access to menstrual products at no charge in restrooms regularly used by all menstruating students in Grades 4-12 in accordance with MN Stat. §121A.212.
- ☒ Evidence suggests parents/students perceive the school provides a safe learning environment.

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Site visit, Annual Report, Crisis Management Policy

Analysis:

Records provided to OW show the school does not perform the mandatory five school lock-down drills, five school fire drills consistent with MN Stat. §299F.30, and one tornado drill in accordance with MN §121A.035, Subd. 2. Prior to any future contract period, the school must ensure it conducts the statutorily required number of drills in the current school year and develop a plan to conduct drills and document them in future years.

3.3 Sustainable Operations: Does the operational decision-making by school leadership and staff, reflect a commitment to environmental sustainability?

☐ **Meets Standard**

The school has a waste reduction and recycling program in place and provides observable evidence that its decision-making and operations reflect a commitment to environmental sustainability, including but not limited to:

- Facilities (e.g. lowering energy costs, refillable water bottle stations, low-VOC cleaners)
- Food (e.g. locally sourced food, low or no waste packaging, ort collection, composting)
- Schoolyard and outdoor areas (e.g. school garden or forest, native plantings)
- Other (e.g. transportation, purchasing, etc.)

☒ **Approaches Standard**

The school has a waste reduction and recycling program in place and one or more of the above elements developing or in need of improvement.

☐ **Does Not Meet Standard**

The school does not have a waste reduction and recycling program in place or does not meet any of the criteria listed above.

Data sources: Site visit, Annual Report, and Osprey Wilds site visit interviews, Osprey Wilds board review and observations

Analysis:

TRM has previously had systems in place to encourage sustainable operations, but those systems have deteriorated in recent years, with the exception of cardboard recycling. Notably, recycling ceased in the building when the school stopped contracting a cleaning service. Recycling bins are present in the building, but are not being used for recycling. TRM previously had outdoor planters to grow produce, which have not been used in at least the last year.

The school has refillable water bottle stations and is working to source compost and recycling haulers. In order to meet standard in future contracts, TRM should work to ensure these programs are in place and waste is appropriately sorted by staff and students.

Operations Performance Indicator 4: Student Rights

4.1 Admissions & Enrollment: Does the school implement open, impartial and transparent admissions and enrollment practices?

☐ **Meets Standard**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the admission and enrollment rights of students, including but not limited to policies and practices related to admissions, lottery, waiting lists, fair and open recruitment.

- ☐ Lottery policy is in alignment with applicable laws and implemented with fidelity.
- ☐ Early Kindergarten admission policy is in alignment with applicable laws and implemented with fidelity (if applicable).
- ☐ School disseminates information about its offerings and enrollment procedures to families that reflect the diversity of Minnesota's population and targeted groups in accordance with MN Stat. §124E.17.
 - Targeted groups include low-income families and communities, students of color, students at risk of academic failure, and students underrepresented in the school's student body relative to Minnesota's population.

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Lottery policy, school website, student enrollment packet, application for enrollment, lottery observations, Annual Report

Analysis:

Prior to any future contract period, the school must revise its Lottery Policy to include the following:

- Give enrollment preference to a Minnesota resident pupil over pupils that do not reside in Minnesota.
- Explicitly state that a charter school must require a pupil who does not reside in Minnesota to annually apply in accordance with MN Stat. 124E.11.
- Clarify that a staff member eligible for an enrollment preference for their child, including a foster child, must be an individual employed at the school whose employment is stipulated in advance to total at least 480 hours in a school calendar year.
- Establish a hierarchy prioritizing enrollment preference for siblings first before enrollment preference for children of staff

Prior to any future contract period, the school must revise its Early Enrollment for Kindergarten / First Grade Policy to include the following:

- The section titled Other Conditions, number 4, includes a statement about activities a child must be capable of (such as toileting). Charter school law is clear that a school may not establish any criteria or requirements for admission that are not allowed by the law. This would include things like measures of achievement or aptitude, athletic ability, potty training, and admissions or application fees. This section of statute (MN Stat. §124E.11) is applicable even to a public charter school's fee-based preschool program. The school should revise its Early Entrance Questionnaire to remove this comment in its entirety.

The school provided evidence of marketing to local families for recruitment, but not specifically to families that reflect the diversity of Minnesota's population and targeted groups as required by MN Stat. §124E.11. In any future contract period, the school must disseminate information about its offerings and enrollment procedures to fulfill this statutory requirement.

4.2 Due Process & Privacy: Does the school honor due process and privacy for all students?

☒ **Meets Standard**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to the due process, privacy, and civil rights of students, including but not limited to:

- ☒ Transfer of student records
- ☒ Evidence indicates the school implements equitable discipline practices and due process protections in compliance with the Pupil Fair Dismissal Act, MN Stat. §121A.40 to 121A.56, and laws governing the discipline and removal of students from class (121A.60, 121A.61, and 121A.65).
- ☒ Evidence suggests school complies with laws prohibiting religious instruction.
- ☒ Evidence suggests school complies with Family Educational Rights and Privacy Act of 1974 (FERPA), laws related to student records and privacy.

☐ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Relevant school policies, student & family handbook, annual charter school statement of assurances, lease aid application, discipline policy

Analysis:

Osprey Wilds found no evidence to suggest that the school does not substantially honor due process and privacy for all students. TRM has its policies listed on its website, including student discipline, bullying prohibition, protection and privacy of pupil records, and several non-discrimination policies.

Operations Indicator 5: Personnel Practices

5.1 Licensure: Is the school's staff appropriately licensed?

☒ **Meets Standard**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to appropriate licensure of school staff.

☒ School staff is appropriately licensed.

☐ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Annual Report, STAR report, requests for special permissions

Analysis:

Evidence from PELSB reports from across the contract period indicate TRM's staff is appropriately licensed.

5.2 Staff Retention: Does the school retain staff at a level that is conducive to operating a successful school?

☐ **Meets Standard**

The school demonstrates stability in instructional and non-instructional staffing that is conducive to operating a successful school.

☐ 80% retention ratio or system that is designed to negate negative effects of high turnover as evidenced by positive academic outcomes

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Annual Report, STAR report, renewal application, site visit interviews

Analysis:

Between FY21 and FY24, the TRM experienced fluctuations in staff retention rates. In FY21, the retention rate for all staff was 50%, which decreased to 32% in FY22 and further to 27% in FY23. By FY24, the school reported an improved retention rate of 70% for all staff. Over the contract period, the average staff retention rate was 45%. These trends provide valuable insight into the school's ability to retain staff, highlight areas for potential growth and improvement, and reflect the impact of the school's operational stability.

In its FY24 Annual Report the school stated that staffing changes have been a struggle; however, the school did not identify any plans on how to combat the low retention rates or how it negates the negative impacts of high turnover. In the 2024-2025 school year TRM has begun to build systems to mitigate the negative effects of high turnover by prioritizing collaboration and consistency. Efforts include a professional development plan for the 2025-2026 school year to ensure staff have a clear roadmap for growth.

5.3 Employment Practices: Does the school engage in appropriate and equitable hiring, evaluation and termination practices?

☐ **Meets Standard**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to employment including transparent hiring, evaluation and dismissal policies and practices, including but not limited to:

- ☒ Evidence suggests the school has open and fair hiring practices based on clear job descriptions.
- ☒ The school has clear employment and evaluation policies outlined in the employee handbook.
- ☐ Evidence suggests the school follows the evaluation processes and policies outlined in its employee handbook.
- ☒ Evidence suggests the school follows the termination processes and policies outlined in its employee handbook.
- ☒ The school conducts appropriate background checks on staff and volunteers in accordance with MN Stat. §123B.03.
- ☒ The school disseminates a clear employee handbook.

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Staff/ employee handbook, staff interviews, background check reviews, organizational chart, hiring policy and procedure manual or relevant policies

Analysis:

In FY23, Three Rivers Montessori received a Notice of Deficiency for failing to consistently conduct background checks before allowing staff to work with students. The review found that while all employees working in the summer program had completed background checks with no negative findings, historical deficiencies existed. Specifically, 10 out of 64 staff members employed since the school's opening (15.6%) were permitted to have student contact before background check results were obtained. Additionally, TRM could not provide evidence of background checks for three former employees, two of whom had student contact. One of these individuals was the subject of the initial complaint. Further, the school was unable to demonstrate that parents were notified of its background check policy during the 2021-2022 school year, as required by Minnesota Statute §123B.03, subd. 1(e).

To address these deficiencies, Osprey Wilds required TRM to establish a clear and transparent background check policy to ensure full compliance, which the board adopted at its September 20, 2022 meeting. Finally, Osprey Wilds required TRM to notify parents and guardians annually—at the beginning of the school year or when a student enrolls—about the policy, specifying the positions requiring background checks and the hiring authority's discretion in conducting checks in accordance with state law. Unfortunately, TRM has not been compliant in notifying parents of its background check policy. Volunteers are stated as requiring background checks, however there is no mention of staff members.

The Notice of Deficiency stated, “This Notice of Deficiency will remain in force for at least one year following the point at which the school can verify that all staff, service providers, board members, and volunteers have background checks on file and longer if this status lapses at any point thereafter.” In site visits on December 7, 2022, May 3, 2023, and October 10, 2023 Osprey Wilds staff verified that all TRM staff, service providers, board members, and volunteers have background checks on file. As a result of the school’s actions in response to the Notice of Deficiency and the demonstrated compliance with statute, the charter contract, and its own policy regarding background checks, OW closed the Notice of Deficiency on November 30, 2023.

TRM’s staff handbook outlines its commitment to conducting background checks for employees, volunteers, contracted workers, and board members in accordance with state and federal laws, including Minnesota Statutes §123B.03 and Chapter 364, as well as the Fair Credit Reporting Act. All individuals are required to complete a background check authorization form, and failure to comply or provide accurate information may result in denial of employment or volunteer status, or disciplinary action, including dismissal. Employment is contingent on satisfactory background check results. To the extent permitted by law, the policy also allows TRM to accept background checks conducted by external firms if they meet the school’s requirements and are shared with TRM. Otherwise, the school may require a separate background check.

Please note, MN Stat. §123B.03 only allows TRM to use the results of a criminal background check conducted at the request of another “school hiring authority,” and only under certain circumstances: if the results are on file with the school or otherwise accessible, if the background check was conducted within the last 12 months, if the individual subject to the background check gives written consent, and if there is no reason to believe the individual has committed an act subsequent to the check that would disqualify the individual for employment.

In addition, TRM should review its background check policy and the “Background Check” sections in its employee and family handbooks to ensure consistency between the two documents. Because there are differences, it may lead to gaps in procedure as the staff who implement background checks turns over.

While the parent handbook currently states that volunteers must undergo background checks and check in with a state identification, it does not explicitly address requirements for staff or board members. Both the Notice of Deficiency issued by OW in 2023 and state law (MN Stat. §123B.03 Subd. 1(e)) require:

At the beginning of each school year or when a student enrolls, a school hiring authority must notify parents and guardians about the school hiring authority's policy requiring a criminal history background check on employees and other individuals who provide services to the school, and identify those positions subject to a background check and the extent of the hiring authority's discretion in requiring a background check. The school hiring authority may include the notice in the student handbook, a school policy guide, or other similar communication.

Prior to any future contract period, the school must update its student handbook to include this annual notification to parents and guardians.

The evaluation policy is not stated in the employment handbook. However, TRM maintains a teacher and staff evaluation policy. The Teacher & Staff Evaluation Policy at Three Rivers Montessori aims to establish a framework for planning and reporting professional learning to

enhance student outcomes. The school is dedicated to fostering the growth and development of all staff through evaluations and professional development plans that align with Montessori principles and the institution's strategic goals. For licensed and certified staff, the evaluation process states that it includes setting goals in the fall, monitoring progress in the winter, and completing a summative evaluation in the spring. This process incorporates elements of Montessori evaluation practices to ensure alignment with the school's vision and mission. Non-licensed staff, including hourly and salaried employees, participate in annual evaluations each spring, with assessments covering areas such as accomplishments, growth, job knowledge, work quality, communication, attendance, and professionalism.

In FY23, FY24 and FY25, interviews with teachers and administration revealed that leadership oversees teacher evaluations, conducting classroom observations followed by one-on-one meetings to provide individualized feedback. The observation rubric used in this process includes mid-year and end-of-year sections and is loosely based on Montessori principles. There has been minimal evidence otherwise regarding the implementation of evaluations throughout the contract term.

Operations Performance Indicator 6: Compliance & Reporting

6.1 Charter School Annual Reports: Does the school comply with statutory and contractual requirements regarding annual reports?

☐ **Meets Standard**

The school complies with applicable laws, rules, regulations, and provisions of the charter contract relating to charter school annual reports, including but not limited to:

- ☐ Statutory and contractual requirements
- ☐ Report submitted to Osprey Wilds by deadline
- ☐ Posted to school website and distributed to stakeholders
- ☐ MN Stat. §120B.11 reporting requirements

☐ **Approaches Standard**

The school complies with applicable laws, rules, regulations, and provisions of the charter contract relating to charter school annual reports, however one or more of the above elements is developing or in need of improvement.

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Annual Reports

Analysis:

Over the course of the contract period, the school has struggled with submitting annual reports to Osprey Wilds on time and in compliance with statutory and contractual requirements.

Most recently, TRM's FY24 Annual Report is not compliant as it does not include several required sections and components, including:

- Governance and management (The authorizer should not be listed as part of this section and it should include a brief narrative about the capacity and role of the board. This narrative should address key indicators included on Osprey Wilds' performance framework. In addition, the report should provide a brief narrative regarding the school's management.) (MN Stat. §124E.16 Subd. 2(a))
- Professional development training of administrators (MN Stat. §124E.12 Subd. 2(e))
- FY24 finances (the report reflects some FY23 figures) (MN Stat. §124E.16 Subd. 2(a))
- WBWF: Educational Effectiveness, Assessment & Evaluation (MN Stat. §120B.11 Subd. 2(6))
- WBWF: Student & Parent Satisfaction (MN Stat. §120B.11 Subd. 7)
- WBWF: Teacher Equity Data (MN Stat. §120B.11 Subd. 2(5))
- Reporting on EE program (Charter Contract Article VI, Section 6.14)
- Teacher professional development activities (Charter Contract Article VI, Section 6.7(a)(6))

While this area is developing or in need of improvement, many sections of the report are thoroughly addressed. Prior to any future contract term, the school will be required to bring its FY24 Annual Report into compliance with statute and the charter contract.

6.2 Insurance: Does the school secure and maintain insurance coverages required by statute and the charter contract?

☐ **Meets Standard**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to insurance coverages, including but not limited to:

- ☒ Workers' compensation insurance
- ☒ Insurance covering all of the School's real and personal property, whether owned or leased
- ☒ Insurance required by MN §124E.09 and MN §466.04, including minimum of:
 - ☒ Commercial general liability insurance in comprehensive form
 - ☒ Bodily injury and property damage combined of one and a half million dollars (\$1,500,000) per occurrence
 - ☒ Personal injury of one and a half million dollars (\$1,500,000) per occurrence
 - ☒ Three million dollars (\$3,000,000) per occurrence for the release or threatened release of a hazardous substance
- ☒ If not included under its general liability coverage, additional coverages as follows:
 - ☒ Minimum automobile liability insurance coverage, bodily injury and property damage, of one million dollars (\$1,000,000) per occurrence if the School owns or operates motor vehicles
 - ☒ Officer and employee errors and omissions/professional liability of one and a half million dollars (\$1,500,000) per occurrence
 - ☒ Employee dishonesty insurance of one hundred thousand dollars (\$100,000)
- ☐ Providing Osprey Wilds in a timely fashion with certificate of coverage that includes Osprey Wilds as certificate holder

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Certificate of Liability Insurance (Acord Form), insurance policy documents, interviews and correspondence with insurance provider(s)

Analysis:

TRM has the proper insurance coverage in place, however; the school did not provide the certificate of coverage to Osprey Wilds in a timely fashion several years of the contract term. Further, the school struggled to submit the correct forms. In the event that the school did not have sufficient coverage (as evidenced by the Certificate of Liability Insurance), this would be a significant threat to the viability of the school.

6.3 Authorizer & State Compliance: Does the school comply with authorizer and state deadlines and compliance requirements?

☐ **Meets Standard**

The school materially complies with applicable laws, rules, regulations, and provisions of the charter contract relating to relevant compliance and reporting requirements to the authorizer, state education agency, and federal authorities, including but not limited to:

- ☒ Evidence suggests the school completes state reporting on time.
- ☐ School website meets statutory requirements.



Minimum 80% on-time percentages in Aerie

Evidence suggests the school fulfills requirements related to TRA and PERA

☐ **Approaches Standard**

The school complies with applicable laws, rules, regulations, and provisions of the charter contract relating to compliance requirements, however one or more of the above elements is developing or in need of improvement.

☒ **Does Not Meet Standard**

The school failed to implement the program in the manner described above; the failure(s) were material and significant to the viability of the school.

Data sources: Aerie on-time rate, MDE communications, TRA/PERA communications, school website

Analysis:

Evidence suggests TRM generally completes state reporting on time and has earned the School Finance Award for every year of the contract.

The school has maintained an average Aerie on-time submission rate of 51% over the term of the contract, falling below the required 80%. The annual on-time rates were 24% in FY21, 50% in FY22 and 78% in FY23. While FY24 is excluded from the calculation due to challenges related to the Aerie implementation, available evidence indicates the school has continued its timely reporting practices into FY25.

The school's website is not fully compliant with statute. Prior to any future contract period, the school must update its website to include the following components as detailed in the school's compliance spreadsheet:

- Per MN Stat. §121A.80 Subd. 4, post the school's Student Journalist Policy.
- Per Title IX, §106.8(C) (2), post a notice of nondiscrimination policy to the school website that complies with the requirements of Title IX.

There are a few elements on the website that should be updated or corrected for clarity and transparency prior to any future contract period:

- The school indicated the board election would be held in May 2025. These dates are not yet posted on the school website. Board election dates and voting procedures must be posted on the school's website at least 30 calendar days before the election. In addition, the candidates' names, biographies, and candidate statements must be posted on the school website at least ten calendar days before the election.

Evidence suggests that the school fulfills requirements related to TRA and PERA.

Osprey Wilds Updates to Recertification 1-28-2025

1. **Student Demographics:** *From Osprey Wilds - student demographics need to be referenced in the future. This is an area that needed adjusting in the annual report, but also needs to incorporate it into the renewal evaluation. The FY24 annual report doesn't have much information. Just 1 year and only has male/female. Usually 3 years of data is included. The FY23 report included more of the information we needed...Special education, English learners, free/reduced, black, hispanic, white....etc.*

MARRS Data

Demographic Trends	2021-22	2022-2023	2023-2024
Total Enrollment	163	157	99
Special Education	17%	22%	27%
English Learners	0%	2%	4%
Free/Reduced Priced Lunch	12%	25%	38%
Black/Africa American	6%	5%	6%
Hispanic/Latino	3%	1%	0%
Asian/Pacific Islander	1%	0%	3%
American Indian	0%	0%	0%
White	90%	94%	91%

2. Attendance Updates p.1

- a. For the school year 2024-2025, TRM's School Social Worker and Administrative Assistant work on ensuring attendance reporting is accurate in addition to contacting parents to help with attendance issues. In addition, staff is making a concerted effort to welcome students daily and communicate with parents the importance of being in school.

Student Attendance

TRM had an expected attendance percentage for the 2023-2024 school year. Overall the school did not experience any significant attendance issues.

2023-2024	
Consistent Attendance Percentage	92.32%

3. Financial Performance p.15

- a. The TRM School Board, Executive Director, and staff are carefully monitoring the enrollment, budget and financial position.
- b. TRM's enrollment is growing with plans for adding a second K-1 and second E2 classroom in the fall of 2025. Already (2025-2026) with the responses received from the lottery process, our kindergarten would be full with a waiting list. Having a solid enrollment will be beneficial to TRM's long term plan and budget.
- c. TRM's Fund balance at the end of June 30th 2025 will be about 14%. Over 200,000 dollars in cuts were made to the budget for the 2024-2025 school year in order to grow the reserve fund.
- d. The school board has taken over greater Governance of fiscal management and now asks questions and expects clear communication from the Executive Director and the financial manager (Creative Planning).

4. Enrollment Variance p.19 and p. 20

- a. During the 2024-2025 school year enrollment at TRM has remained stable. The school hovered around 120 in K-6. Enrollment was monitored and the budget was adjusted appropriately. TRM works closely with Creative Planning.

Student Attrition

Percentage of students who were continuously enrolled between October of 2023 - October of 2024	70%
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Percentage of students who continued enrollment in the school from Spring 2024 to Fall of 2024	74%
--	------------

Student Mobility

TRM experienced a high amount of student mobility during the 2023-2024 school year as indicated by the chart below. Waitlists continue to be used to fill seats throughout the school year as they become available.

Summer Transfers in	Number of students on Oct. 1	Mid year transfers in	Mid year transfers out	Mid year total transfers	Mobility index* (as a percent)
11	100	4	5	-1	-.01%

*Total Mid-year transfers (in and out) divided by number of students as of October 1st

5. **TRM does not assess fees from students. We do not have a policy on this.**
(p. 21)

6. **Financial Reporting p. 21, 24, 25: Epicenter / Aerie submissions were late over the course of the contract period. Reporting in FY21 was only 43%, in FY22 was 0% and in FY23 was 60%. This is far below OW's expected compliance of 80% and therefore does not meet standard for this measure.**
 - a. The 2024 Fall Audit was submitted to Osprey Wilds on time.
 - b. Creative Planning submits financial reports for TRM to include quarterly reports and average daily membership to MDE.

7. **Educational Program (Staff Development) p. 34 and p. 35 :Must create a system approach to the instructional planning process, and align with State Standards to ensure fidelity of curriculum. Review data to adjust curriculum based on student outcomes.**
 - a. Currently (2024-2025), TRM teachers review Fastbridge data regularly and in data meetings held four times per year beginning this school year. MTSS meetings are held monthly and more often if needed. TRM will create a calendar of assessment periods and data review meetings along with MTSS meetings with staff. Currently we have a monthly calendar however we also will add a yearly calendar.
 - b. Using "Transparent Classroom" this year has brought the teaching staff together on reflecting on practice. Teachers meet twice per month to reflect on instructions and on creating a warm welcoming culture, which is a strong foundation for student learning.
 - c. **Below is one important area of staff development this coming year**, a highlight for us: Three Rivers Montessori School staff will participate in a book study for the year 2024-2025. The focus is on creating and maintaining a safe and healthy school through positive classroom and school culture.

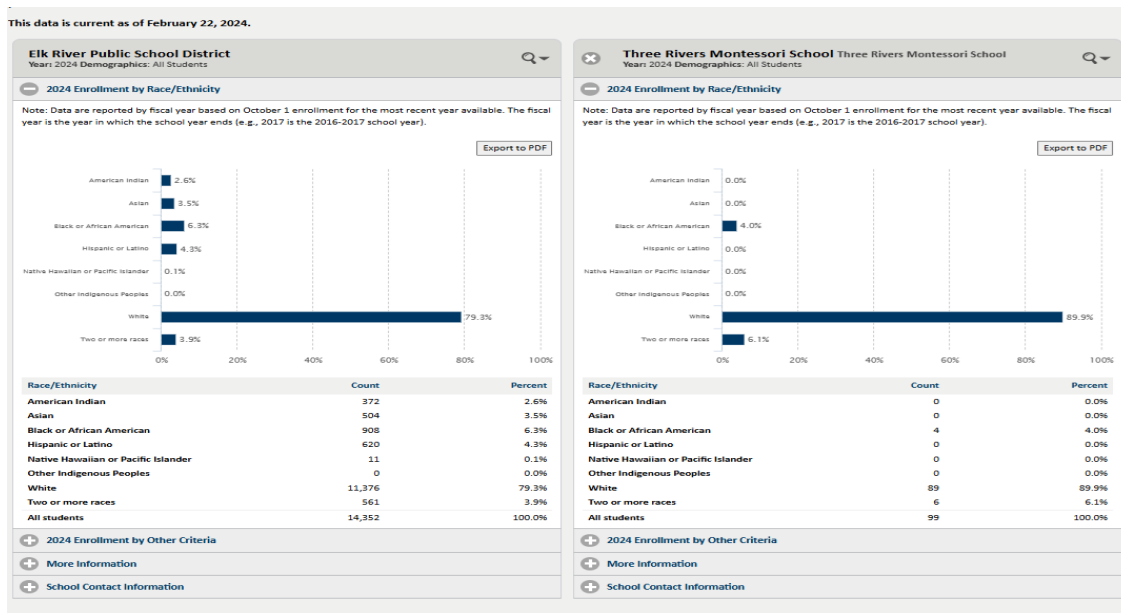
- d. Staff will read and implement strategies from the book: Positive Discipline in the Montessori Classroom. Although the book is focused on the Montessori classroom, the strategies are foundational for building positive classrooms and schools in any setting.
- e. Staff will meet monthly to discuss strategies implemented in the classroom. This study will be evaluated three times this coming year (fall, winter, spring) through teacher feedback, self-evaluation, and walkthroughs by administration and staff.

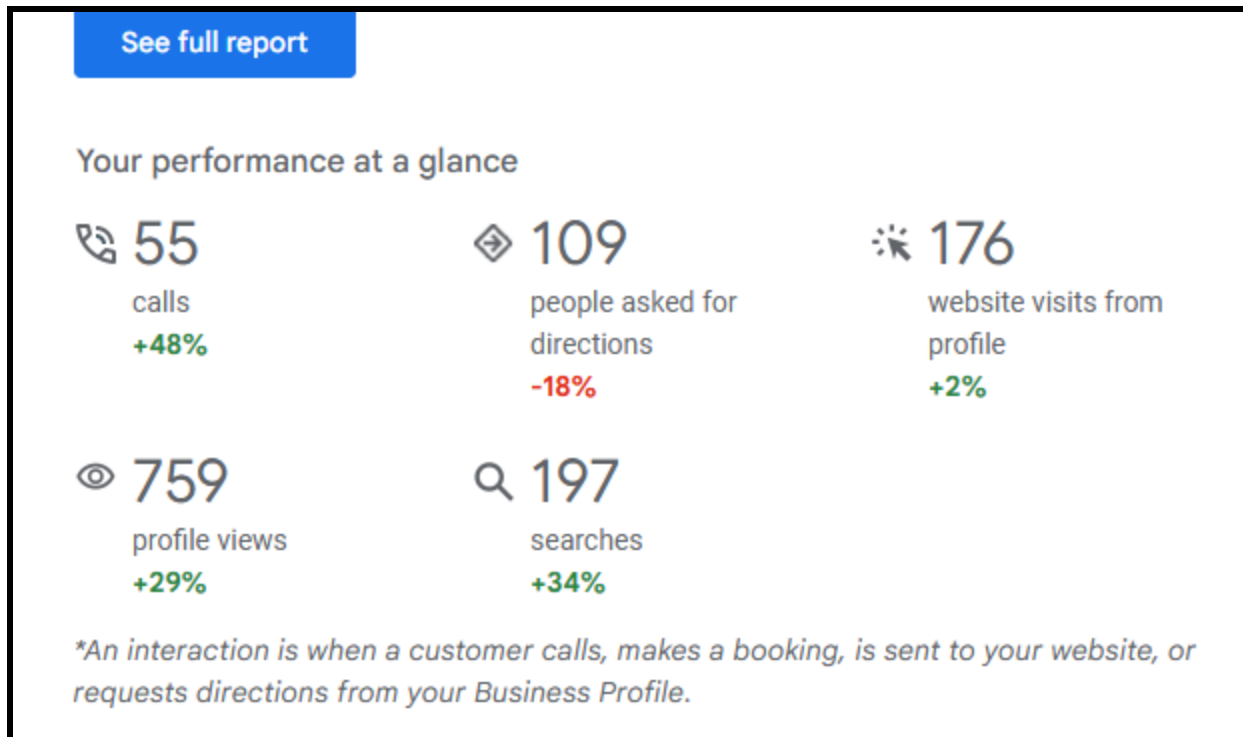
8. Observations in the Montessori Environment p.38: TRM utilizes the evaluation document linked here: [PDF TRM Teacher & Staff Evaluation Policy.pdf](#)

- a. Montessori tools will be utilized from Public Montessori in Action: [Montessori-action.org](https://montessori-action.org)
- b. Culturally Responsive Methodologies will be studied and implemented before the beginning of the school year 2025-2026. Rubrics, student data, and a peer review process will be in place. MDE has made the expectation that all schools will move to Culturally Responsive Methodologies during the fall of 2025.

9. Equity p. 40

- a. During the winter of 2025, much effort was made on outreach to families for future enrollment. The area we serve is shown in the diagram below. Our 2024-2025 free and reduced population is 30.3% Our current special education population is almost 25%.





TRM Marketing efforts January 2025

10. Educational Requirements p. 42 and 43: Does Not Meet kinder readiness goal in Exhibit G of the contract with Osprey Wilds. The school will address this goal further in 2025-2026.

a. Currently the WBWF Kindergarten goal is:

TRM Goal 1 for 2023-2024 Results:

Three Rivers Montessori K/1 students increased on all five questions asked from Fall to Spring.

Examples of Strategies to Achieve This Goal:

Three Rivers Montessori embeds Grace and Courtesy lessons which allow our youngest learners to develop and attain their ability to be self-aware. Intentional work on these lessons will lead to increases in their ability to show compassion, discover their potential, and reflect on their individual growth.

TRM will not have a preschool program for the year 2025 - 2026. At this time there are no plans to reinstate the preschool program due to space limitations.

Exhibit G

Three Rivers Montessori
Exhibit G: Academic and Academic-Related Goals
Contract Period July 1, 2017 through June 30, 2023

As articulated in MN Stat. 124E.10, Subd. 1(b), "A charter school must design its programs to at least meet the outcomes adopted by the commissioner for public school

- ☐ **Ready for Kindergarten [R4K]**
All students are ready for kindergarten.
- ☐ **Reading Well by 3rd Grade [RG3]**
All students in third grade achieve grade-level literacy.
- ☐ **Achievement Gap Closure [AGC]**
All racial and economic achievement gaps between students are closed.
- ☐ **Career and College Readiness [CCR]**
All students are career- and college-ready before graduating from high school.
- ☐ **Graduate from High School [GRAD]**
All students graduate from high school.

Each measure is weighted to indicate its overall significance in fulfilling the primary purpose of improving all pupil learning and all student achievement. The school earns a

- ☐ Exceeds Target: $\times 1.5$ points
- ☐ Meets Target: $\times 1.0$ points
- ☐ Approaches Target: $\times 0.5$ points
- ☐ Does Not Meet Target: $\times 0.0$ points

Indicator areas are then assigned a rating based on the percentage of points earned:

- ☐ Exceeds Standard = 100.1-150.0% of points earned
- ☐ Meets Standard = 75.0-100.0% of points earned
- ☐ Approaches Standard = 50.0-74.9% of points earned
- ☐ Does Not Meet Standard = 0.0-49.9% of points earned

11. TRM is in the process of creating a parent Curriculum and SPED Advisory Council. (p. 44)

- a. A parent meeting was held on Thursday January 16th 2025 in regards to parent involvement. Almost 30 parents attended. Many were interested in joining a curriculum/special education committee. A Survey was sent to families after the meeting to gain more insight for parent views and volunteerism.

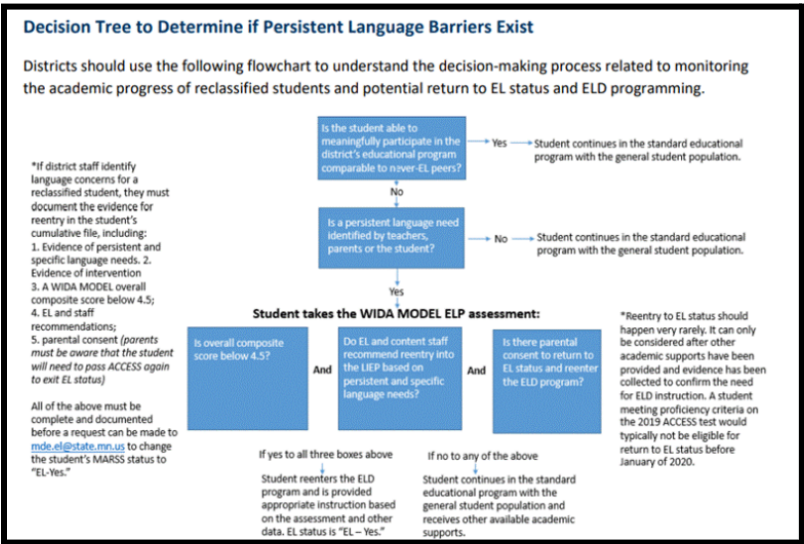
12. English Learners p. 44 and 45 - Does Not Meet Standard - Provide evidence that the school is providing services to EL students as described in the renewal application. However, the school is in the process of updating its LIEP plan. From Osprey Wilds: The school will be required to update its LIEP Plan prior to any future contract period. An example plan with guidance is available on the Minnesota Department of Education English Learner Education webpage. <https://education.mn.gov/MDE/dse/el/>

- a. Upon acceptance to TRM each family receives a home language questionnaire in the enrollment packet. Parents or guardians of incoming students note the primary language spoken at home. If the parent(s)/guardian(s) note another language other than English is spoken at home then the school team and parent will meet to determine additional

needs the student may have and services are provided accordingly through appropriate sources.

- b. Individual and small group instruction is in place for our EL students who need additional support in academic areas. During the school year 2024-2025, four students were identified as having a primary language in the home other than English. All four students received additional programming in reading and math as needed through small group instruction with an interventionist. TRM's MTSS team regularly evaluates data and instructional practices for changes needed or for additional support needed.
- c. Data Forms used by the MTSS team group students in percentile quadrants after Fastbridge testing. The goal is for students to move up in quadrants/percentiles. For example, if a student is at the 25th percentile in the fall and the 25th percentile in the spring, there is only one year of growth. The goal is for a student to grow more than one year in reading and math if they are below the 50th percentile. This is catch up growth.
- d. *Class At-A-Glance*:

0-25 th percentile	26-50 th percentile
51-75 th percentile	76-100 th percentile



13. Parent and Student Satisfaction p. 45: Must survey both yearly (must ask safety question and satisfaction)

- a. Surveys are being utilized during the 24-25 school year. The first parent survey was sent in July of 2025. Now, in January, another survey has been sent and completed. [Winter Parent Survey Response 24/25](#)

14. Governance p 47, 48, 49 : The School Board should approve all hires as a formality.

From Osprey Wilds: Please note, board action should be taken to approve all hiring for the school. For the Board's employees (i.e. Executive Director) this is an approval of the candidate for hiring. For all other employees this serves as an approval of an ongoing expense (liability) to the school. It is not an approval of the candidate. In TRM's case, it is also an opportunity to ensure that the school's emergent processes, such as background checks, are functioning properly.

New requirement under law. Update policy. Training for board

members...Example - financial governance, oversight, and questions to

ask...From Osprey Wilds on the requirements for school board training: Beginning in 2024, MN Stat. §124E.07 Subd. 7 (d) requires, "Every charter school board member must complete annual training throughout the member's term based on an annual assessment of the training needs of individual members and the full board." Statute goes on to say, "Ongoing training includes but is not limited to budgeting, financial management, recruiting and hiring a charter school director or chief administrator, evaluating a charter school director or chief administrator, governance-management relationships, student support services, student discipline, state standards, cultural diversity, succession planning, strategic planning, program oversight and evaluation, compensation systems, human resources policies, effective parent and community relationships, authorizer contract and relationships, charter school law, legal liability, board recruitment and elections, board meetings and operations, policy development and review, and school health and safety."

a. School Board Trainings Document: See TRM 24-25 Compliance Spreadsheet  Board Member Training Compliance 2025

b. Evaluate School Board - Align and update by June 30th 2025.

[Policy 203 Board Self Reflection](#)

c. School Board Elections - all must participate.

15. Report to the School Board p.52:

- a. Beginning in 2024-2025 these reports are consistently on the agenda monthly but at least 4 times per year:

- i. Academics, Environmental Education, Finance, Operations (Exhibit Q of the charter contract)
- ii. TRM has followed this recommendation during the 2024-2025 school year.
- iii. Utilize the school board calendar from Osprey Wilds

16. Policies p. 53, 54

- a. Policies have been updated and are on the website. Still needed are Library Materials Policy, Record Retention Policy, and Title IX. We do not require student fees and we do not need a concussion procedure.
- b. Reviewed and updated policies - Public Data, Nepotism, Admissions, Personnel
- c. Grievance Procedures approved 9-17-2024
[Policy 105 Whistle Blower](#)
- d. Bylaws updated
- e. WBWF updated

17. Management Accountability p. 54 (Does not meet)

- a. The School Board in August of 2024, reviewed a new document as recommended by MSBA for the Executive Director's evaluation process. The school Leader must be accountable for charter contractual issues with the authorize. Charter School laws state this (see charter school contract) See below for Executive Director Goals:

Three Rivers Montessori School	
Executive Director Performance Evaluation for SY 2024-2025	
A. Governance i. Standard 1.b - Goals and/or Strategic Plan B. School Finances i. Standard 2.a - Budget Development and Maintenance ii. Standard 2.b - Financial Statements C. Communication and Community Relationships i. Standard 3.a - Relationships with the Community ii. Standard 3.b - Engagement iii. Standard 3.f - Visibility & Approachability D. Teaching & Learning i. Standard 6.a - Staff Development ii. Standard 6.b - School Improvement	
PERFORMANCE GOALS AND STANDARDS	
A. Governance Standard 1.b - Goals and/or Strategic Plan b. Maintain a school district	Objective 1.: By January 30th and June 30th 2025, the Executive Director will develop and implement a three to five-year budget projection plan that considers enrollment, anticipated state and federal funding, expected expenses and benefits, reduces the deficit, a

- b. From Osprey Wilds: MN §124E.07 Subd. 6 states, "The board shall adopt personnel evaluation policies and practices that, at a minimum...evaluate how charter contract goals and commitments are executed..."

18. School Environment - School Safety p. 59 (Does not meet)

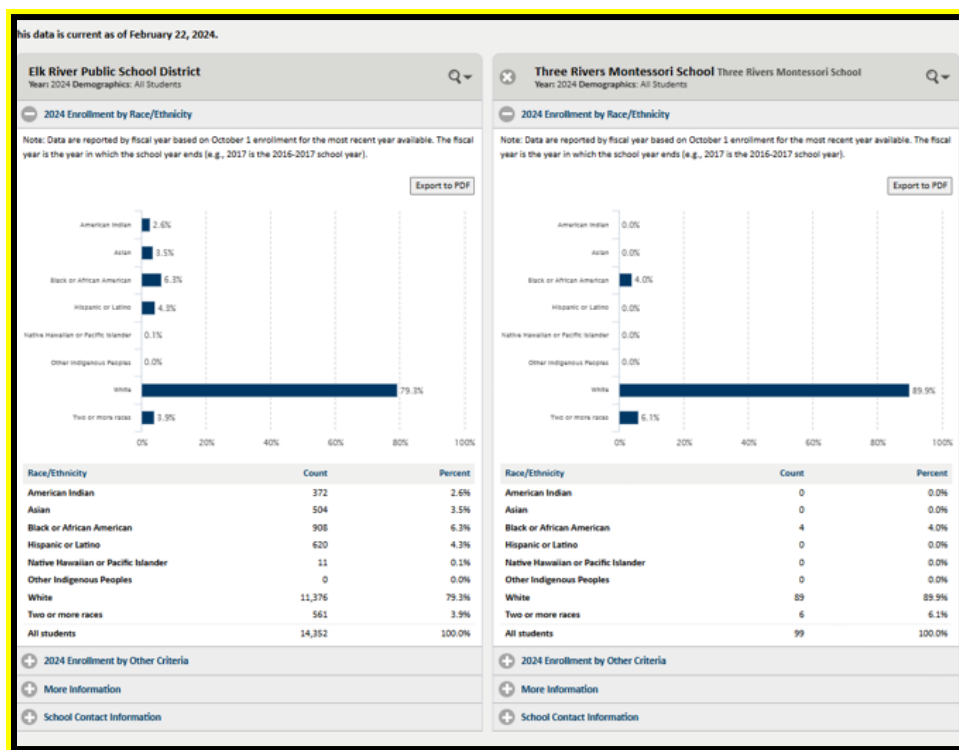
- a. Crisis Management policy update is needed and will be addressed before the end of June 2025.
[Policy 801 Crisis Management](#)

19. Student Rights p. 61 (Does Not Meet)

- a. Lottery and Admissions Policy updated:
[Policy 102 Application, Enrollment and Lottery](#)

20. Disseminate information about our offerings p. 62 (Must do!) :Enrollment procedures to families that reflect a diverse background - Provide evidence - Marketing

- a. School Year 2024-2025 Marketing efforts were in place on Facebook and through parent referrals. Videos were sent to a larger audience. The website is being updated inviting parent tours.
- b. Outreach to Headstart programs will be done in the future.



21. Staff Retention p.63 (Does Not Meet) (Add Professional Development plan 2025-2026):Criteria: 80% retention ratio or system that is designed to negate negative effects of high turnover as evidenced by positive academic outcomes. Can be helpful to explain how your school does that.

- a. School year 2024-2025, all staff returned to TRM except for two terminations due to budget cuts. Two other staff members resigned for

opportunities elsewhere and were not replaced (ED and Director of Teaching and Learning). Later in the year two more people resigned for various reasons. However, TRM did have additional openings for paraprofessionals, a special education teacher, and one kitchen manager. All positions were filled.

- b. Emphasis is on building a collaborative community where we all work together to help one another succeed.
- c. A staff survey was conducted in early January 2025. Most staff feel like they help others and others help them.

TRM Staff Survey Winter 24/25

- d. A Professional Development plan has been created for the school year 2025-2026.

Three Rivers Montessori Professional Development Plan 2025-2026 - Draft

Empowering Students to Reach Their Full Potential Through Montessori Learning

The best way to plan staff development is to assess your goals and needs first, then find professional development that supports them. It's also critical that you assess student data as part of the planning process to ensure needs are met. Professional development should be research-based. Effective professional development is based on solid research.

Professional Development Plan for Montessori Education (Teachers)

The teacher will seek **preapproval** and report progress to TRM Administration on:

- 1. University programs and credits
- 2. Clock hours for workshops – 125 clock hours equals 3 credits
- 3. Document videos, readings

The school will provide for teachers:

- 1. Five days during the school year to attend Montessori PD to include:
 - a. Classes/Workshops
 - b. Observations at other Montessori Schools
- 2. New teacher mentorship

All Professional Development will be documented in the teacher's personnel file with signatures of the teacher and administration.

The school will provide instruction on these topics school wide:

1. MTSS and PBIS
2. Positive Classroom Management
3. Special Education expectations and services
4. New Teacher/EA/Paraprofessional mentorship
5. Mandatory trainings
6. Topics of need will be incorporated into staff meetings monthly and/or bi-weekly

22. Parent and Student Handbook update on background checks p. 65 - see below for the update from Osprey Wilds:

From Osprey Wilds: While the parent handbook currently states that volunteers must undergo background checks and check in with a state identification, it does not explicitly address requirements for staff or board members. Both the Notice of Deficiency issued by OW in 2023 and state law (MN Stat. §123B.03 Subd. 1(e)) require: At the beginning of each school year or when a student enrolls, a school hiring authority must notify parents and guardians about the school hiring authority's policy requiring a criminal history background check on employees and other individuals who provide services to the school, and identify those positions subject to a background check and the extent of the hiring authority's discretion in requiring a background check. The school hiring authority may include the notice in the student handbook, a school policy guide, or other similar communication.

23. Evaluation of Staff Documentation p. 66 : Must provide five years of evaluation documentation.

- a. Currently, evaluation documents are in a google file under HR. Going forward, a chart will be created to document/spreadsheet walkthroughs and evaluations with dates.
24. Compliance Reporting p. 67 (Does Not Meet Standard)
- a. The website has been updated and in compliance.
25. Compliance Reporting Spreadsheet Update p. 69 Website update
- a. The compliance reporting spreadsheet needs updating in some areas. TRM is currently completing work on updating the WBWF and Bylaws.

April 8, 2025

Osprey Wilds – Charter School Division

Attn: Erin Anderson, Director of Charter School Authorizing

1730 New Brighton Blvd., Suite 104

PMB 196

Minneapolis, MN 55413

Re: Three Rivers Montessori School

Notice of Intent to Not Renew Charter Contract

Hello Ms. Anderson:

My name is Jenny Hepokoski, MA, CCC-SLP. I am the Board Chair of Three Rivers Montessori School (the “School”). I was elected to my first term on the School’s Board of Directors in May of 2024 for a term that began on July 1, 2024. Thus, this current fiscal year (2024-2025) is the first year I have served on the Board. I am the mother of two 8-year old boys who attend Three Rivers in the 2nd grade, and another nearly 5-year old daughter who will plan to attend Kindergarten this coming year. I am a long-term resident of the Elk River community. As a parent of Three Rivers students, a Speech Language Pathologist with 4 ½ years experience in working in public schools in MN, I am deeply committed to both my community and to the mission of continuing to provide high-quality Montessori education to the children of this community on a tuition-free public charter school basis. To that end, I am personally committed to Three Rivers Montessori.

I am writing to respond to the March 17, 2025, Notice of Intent to Not Renew Charter Contract (the “Notice”) received by Three Rivers on March 17th, 2025.

I would note at the outset that, even before we received the Notice, I had observed most of the operational and academic issues raised in the Notice. As Board Chair, I am 100% aware of the responsibility of the school’s Board of Directors for fiscal and academic performance. I have focused my attention on leading the board in a manner to address these issues head-on. Among other things, the school has engaged Dr. Paula Henry as our new Executive Director. Under this new leadership, the school has made substantial progress toward its prior trend of lagging academic performance, and has taken many concrete steps to cut expenses. At present, our test data shows an increase over last year in every measure, and our fiscal year will end with a budget surplus. In fact, our current-year data shows a clear path to viability, both present and future.

The penultimate sentence of the Notice states: “[T]he School does not have a clear future path toward viability.” I could not disagree with that statement more strongly. As a parent, I could not disagree with this more strongly. I have chosen to enroll my three children in the school. I believe in Montessori education and I have joined the board because I know that our board can improve those outcomes. In fact, we have already improved those outcomes.

The Notice enumerates three groups of concerns: (1) student performance, (2) fiscal management, and (3) contractual and legal compliance. My letter will address all three.

Before addressing the substantive issues, I must raise a procedural concern. Although Osprey Wilds has, as you note, given four notices of non-compliance to the School, two of those were given in 2020 and the other two were given on October 15, 2021 and July 1, 2022. All four have been closed.

I point this out because at the time the School submitted our request to Osprey Wilds for contract renewal (fall of 2024) there were no outstanding Notices of Concern, which Osprey confirmed in its January 3, 2025 email: “Osprey Wilds did not issue any notices of concern, notices of deficiency, notices of probationary status, notices of corrective action, charter revocation letters or other intervention letters and/or emails to Three rivers Montessori in which Osprey Wilds disclosed concerns about TRM and/or required corrective action and/or raised the possibility of revoking or terminating TRM's Contract or non renewing its contract.”

We certainly acknowledge that the concerns stated in the Notice are profound and well-deserved. However, from a procedural perspective, there is a sense that the School is being “blind-sided” by an action as drastic as non-renewal in the face of current-year data showing substantial progress on both academic and fiscal performance.

Keep in mind that the school has been operational for only four years, and that those four years have seen the School impacted by some external events beyond its control. The first operational year began in the midst of the covid-19 pandemic. Montessori education is especially hands-on. It was extremely difficult to start a Montessori program under those conditions. The School was also impacted by a start-up coordinator who was then engaged as Executive Director but who then quit and committed acts of cyber-crime against the School. Despite all of this, the School managed to finish the year intact and functioning, and it managed to grow its program through FY 2021-2022 and 2022-2023.

In the 2023-2024 fiscal year, the school faced significant financial losses, primarily due to a sharp decline in enrollment. This drop was largely the result of a change in school start times, which was implemented to accommodate transportation needs, as well as challenges stemming from a leadership transition that negatively impacted the school culture.

The school contracts with the local district for busing services, and the district made changes to transportation schedules for the 2023-2024 school year, requiring our school start time to shift from 8:10 AM to 7:30 AM. Despite extensive negotiations with the district, the school was unable to reverse this change. Funding a private transportation service was estimated to cost around \$200,000 annually, an option we could not afford.

Approximately half of the families who withdrew from the school cited the new start times as a major factor, as it no longer suited their schedules. The remainder of the families left due to issues with the school culture at the time.

Since then, our school culture has seen significant improvement, as demonstrated by our increased enrollment, positive feedback from families and students through surveys, and the fact that most new families have been referred to us through word of mouth.

Given the upward trend in the data and the lack of any “heads up” from Osprey Wilds, we believe that a brief probationary renewal, even just for one year, is a more appropriate outcome for the School.

1. STUDENT PERFORMANCE

Let me begin by saying that, as a parent of two current Three Rivers pupils, there is probably no human who is more concerned by the School’s low test scores than I am. As you note, starting with FY 22 and ending with FY 24, the school’s MCA scores declined from 55% to 53% to 39%.

I will explain the roots of this. I realize that explaining a thing is not the same as excusing a thing, but understanding the roots of a problem is the first step toward fashioning a solution.

First, the lower MCA scores have a very clear correlation with an increased number of Special Education students at the school. As we observe an increasing percentage of SPED students, we have also observed lower test scores. When we isolate General Education students only, we observed a material increase in MCA proficiency from FY 23 to FY 24.

An additional factor has been instability of the School’s leadership. The school first became operational July 1, 2020, just at the start of the covid-19 pandemic. At the time the school first opened, its board consisted of:

- Leah Studaker (Board Chair and School founder)
- Troy Hanson (Board Treasurer and School founder)
- Christine Castagneri (Board Secretary and School founder)
- Carlo Galeazzi
- Lisa Andrican

Of those original directors, none remains on the board. The current board consists of:

- Timothy Erlich (first term beginning July 1, 2022)
- Lydia Skadberg (first term beginning July 1, 2023)
- Brooke Blomker (first term beginning July 1, 2023)

- Nikki Patterson (first term beginning September 16, 2023)
- Jenny Hepokoski (first term beginning July 1, 2024)
- Jan Creed (first term beginning September 17, 2024)

In the meantime, across just four full fiscal years of operation, the six-person board has seen 18 distinct individual board members come and go, with only a single individual consistently on the board. This has been very disruptive to the board's ability to do its job.

In addition, the School has seen five Executive Directors:

- Therese Zadnik-Kleckner (engaged to be the start-up director, but resigned abruptly on July 14, 2020 and then committed cyber crime against the School)
- Rose Bringus (July, 2020 through October 28, 2021)
- Jonna Duke (interim director after Rose Bringus through June 30, 2022)
- Antonio Kuklok (July 1, 2022 – June 30, 2024)
- Paula Henry (July 1, 2024 to present)

Again, I present the information above not as an excuse, but rather as an explanation. Simply put, the School has struggled to attain stable leadership. This struggle distracted from the important focus of the board on student performance, which is evident from the raw data you cite in the Notice.

Speaking personally, I can assure you that as the board chair and a parent of School pupils, I am personally committed to continuing to restore the School to excellence, and I believe the School has made great progress in this regard even today.

The current Board has appointed a new Executive Director and has directed the Administration to take proactive steps in researching and implementing data-driven programs aimed at enhancing academic achievement for our students. During the 2024-2025 school year, the school has successfully launched several initiatives that have demonstrated measurable improvements in academic performance. These include:

- FastBridge Assessments: These assessments provide critical data to monitor student progress and identify areas for targeted intervention.
- Multi-Tiered System of Supports (MTSS): The MTSS team works collaboratively to deliver personalized support to students, ensuring that all learners receive the necessary resources for academic success.

- Title 1 Reading Program: This program offers additional literacy support to students in need, with a focus on improving reading skills.
- AmeriCorps (Reading Corps): Through this initiative, trained tutors provide individualized reading support, enhancing student literacy outcomes.
- Read-at-Home Program: Encouraging students to read outside of school hours fosters greater literacy development and promotes family involvement in the educational process.
- Increased Reading Volunteers: The addition of more reading volunteers ensures more one-on-one support for students, bolstering their literacy skills.
- Nurtured Heart Social-Emotional Learning (SEL) Curriculum: The SEL curriculum emphasizes the development of emotional intelligence, positively influencing both student behavior and academic performance.

Further details on the implementation and progress of these programs can be found in the attached document.

2. FISCAL MANAGEMENT

The same leadership turnover that led to the decline in student performance has been the main vector in the school's declining finances. However, in addition to leadership turnover, there is the simple reality that the Covid-19 pandemic significantly impacted charter school enrollment. Further, the single decision about transportation in FY 2023-2024 caused a substantial financial loss to the School.

Current leadership has already taken steps to address this. At present, the School expects to finish the current fiscal year with a \$135,223 surplus.

This has been accomplished by the following:

- Reducing salaries and benefits, the largest budgeted expense, by 19%
- Reducing contracted services 25% by adding janitorial services to current staff duties
- Negotiating with the landlord to reduce the lease by 19% which helped to maximize the amount of revenue received from MDE
- Reducing non-instructional supplies and software needs by 32%

As noted in the Notice, the ongoing lease expense is also a concern. When the School engaged with the current property owner for the lease, the leadership in place at that time was budgeting for a growth to 165 students in the school. Current leadership continues to recruit and enroll new students. We do feel that the demand for in-person Montessori in Elk River is growing and that we will achieve enrollment at or near that level in the next several years. These projections are detailed further in the attached document.

3. COMPLIANCE WITH CHARTER CONTRACT AND LEGAL REQUIREMENTS

Some of the items in the four notices of intervention spoke to issues of governance and legal compliance. As discussed above, early school leadership was volatile, and in particular the leadership leading up to the opening of the school.

To my knowledge, the School has not received a notice of intervention since the start of FY 2022-2023. More to the point, prior to the Notice, Osprey Wilds did not communicate to school leadership that Osprey Wilds felt the School was deficient in our compliance with the charter agreement.

We recognize that compliance is the responsibility of the Board regardless. However, as noted, there was no deficiency communicated to the School at all during the 2023-2024 school year, nor the 2024-2025 school year. Had there been concerns raised, the Board would take immediate action.

Three Rivers Montessori acknowledges the compliance issue regarding the Board of Directors' obligation to evaluate the school leader, as required by state law. While a Director Performance Evaluation Policy was adopted in January 2020, it was not fully implemented during the early years of the Executive Director's contract due to turnover in the position. The Board regrets this oversight and seeks guidance from Osprey Wilds on whether to retrospectively complete the missing evaluations for FY21 and FY22. Since the 2023-2024 school year, a Review Committee has been established to collaborate with the Executive Director on goal-setting and performance evaluations.

Although Three Rivers Montessori has not received any notices of deficiency or concern regarding our governance, the Board of Directors had directed the Executive Director to proactively update and revise policies and handbooks in preparation for the 2024-2025 school year. In addition to fulfilling the minimum governance requirements outlined in the charter school agreement, the Board has worked closely with school administration to further develop and enhance governance practices. The Board recognizes governance as a top priority and remains committed to continually improving oversight to ensure the long-term success and sustainability of Three Rivers Montessori. For further details, please refer to the attached document.

4. AUTHORIZER CONTRACT REQUIREMENTS

Three Rivers Montessori has actively addressed concerns raised by Osprey Wilds and is focused on meeting the terms outlined in the Authorizer Contract. The school has made significant strides in academic performance, particularly in reading and math, with evidence of strong growth across various

student subgroups, including Special Education and Free/Reduced Priced Lunch students. The school has implemented the Nurtured Heart Social Emotional Learning (SEL) program to support both academic and social-emotional development, further enhancing the Montessori educational experience. Additionally, the school has maintained high attendance rates, surpassing its attendance goal of 92%, achieving a rate of 92.32% for the 2023-2024 school year.

In terms of governance, the Board of Directors has demonstrated a commitment to improving oversight and ensuring the long-term success of the school. Board members, with a diverse range of expertise, actively support the school's mission and governance practices. The Board has worked to ensure effective staff development, retention, and satisfaction, as well as compliance with all licensure requirements. The school leadership continues to prioritize transparency, accountability, and regular evaluation through board meetings, work sessions, and strategic planning, ensuring alignment with both statutory and authorizer expectations. These ongoing efforts reflect the Board's commitment to continuous improvement and the overall success of Three Rivers Montessori.

In closing, Three Rivers Montessori recognizes the challenges outlined in the Notice and is committed to addressing them head-on. The school has made significant strides under new leadership, and we firmly believe that with continued support and focus, the school is on a clear path toward long-term success. We believe that Three Rivers is meeting all authorizer requirements. However, at a minimum, we respectfully request a brief probationary renewal to allow the school to build on this momentum and further strengthen its academic and financial performance. We look forward to working collaboratively with Osprey Wilds to achieve these goals.

Thank you for your consideration and continued support.

Sincerely,

Jenny Hepokoski, MA, CCC-SLP

Three Rivers Montessori School Board Chair



April 9, 2025

Response: Notice of Intent to Not Renew Charter Contract

Three Rivers Montessori School Board of Directors takes very seriously our role as the governing Board of Directors of Three Rivers Montessori.

Outlined in this document the Board will address all areas of concern brought by the Osprey Wilds Charter School Committee and their Board of Directors.

Osprey Wilds' areas of concern, to be addressed by the Three Rivers Montessori Board of Directors, include:

- Student performance
- Fiscal management
- Compliance with charter contract and legal requirements

Three Rivers Montessori will continue to build on the foundational structures established under the direction and guidance of the School Board. Outlined below are the key focus areas that the School Board will continue to strengthen. These actions are designed to not only support student success but also to enhance community visibility and engagement, ultimately leading to increased school enrollment and broader community support.

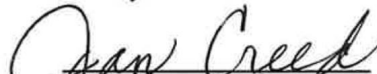
Sincerely,


Jenni Hepokoski
Board Chair


Brooke Blomker
Board Secretary


Tim Eilrich
Board Treasurer


Lydia Skadberg
Board Member


Jan Creed
Board Member


Nikki Patterson
Board Member


Patrick Locken
Board Member

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SECTION 1. Student Performance

“The school’s overall academic performance does not meet standard, earning 39% of the points available through FY24, the most recent year for which data is available. In its most recent academic performance evaluation (attached), the school did not meet standard in any core academic area, including reading proficiency or growth, math proficiency or growth, and science proficiency. “In addition, the school’s academic performance has declined across the contract period, earning 55% of the points through FY22, and 53% of the points through FY23.”

“ACNW will also consider the degree to which the School has improved all pupil learning and all student achievement other than the attainment of goals specified in Exhibit G.” The school did not provide additional evidence to demonstrate it is fulfilling the primary purpose of charter schools (“to improve all pupil learning and all student achievement”) and did not provide evidence the school is fulfilling additional statutory purposes.”

The Board of Directors acknowledges the concerns Osprey Wilds raises about the school meeting its original academic goals. We would like to use this opportunity to both provide additional context and directly address what action the Board has taken to support and improve academic achievement.

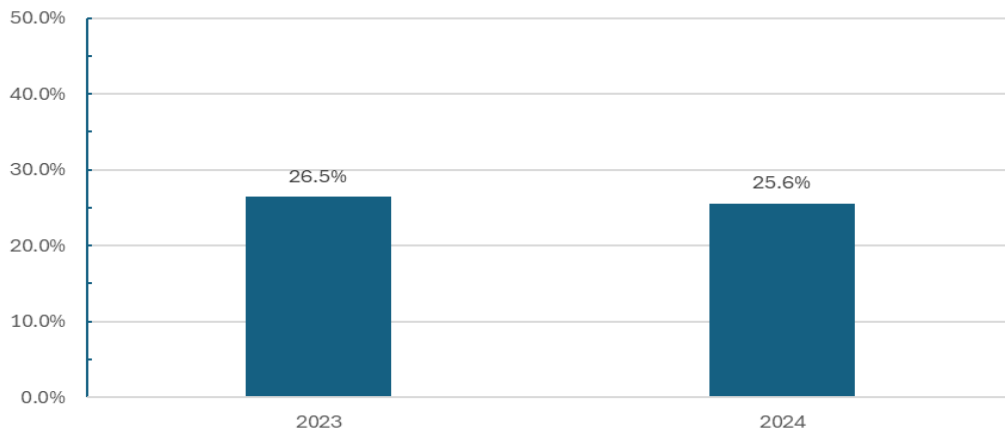
Minnesota Comprehensive Assessment (MCA) Scores

In reviewing our board meeting minutes, the Three Rivers Montessori Charter School Board has consistently provided oversight of MCA testing requirements over the past five years. A review of our board meeting minutes confirms that the board received regular updates on testing schedules, ensuring appropriate oversight of all state-mandated assessments.

Throughout our contract period, Three Rivers Montessori has previously utilized the testing data from MCA results to track student success and areas for improvement. However, after further research and a material rise in the number of students with Individualized Education Plans (IEPs), we believe the MCA data does not accurately reflect the school’s overall student growth. Specifically, the data from the MCA results has become less effective as a tool for measuring progress, particularly due to the increasing Special Education population and the small sample size.

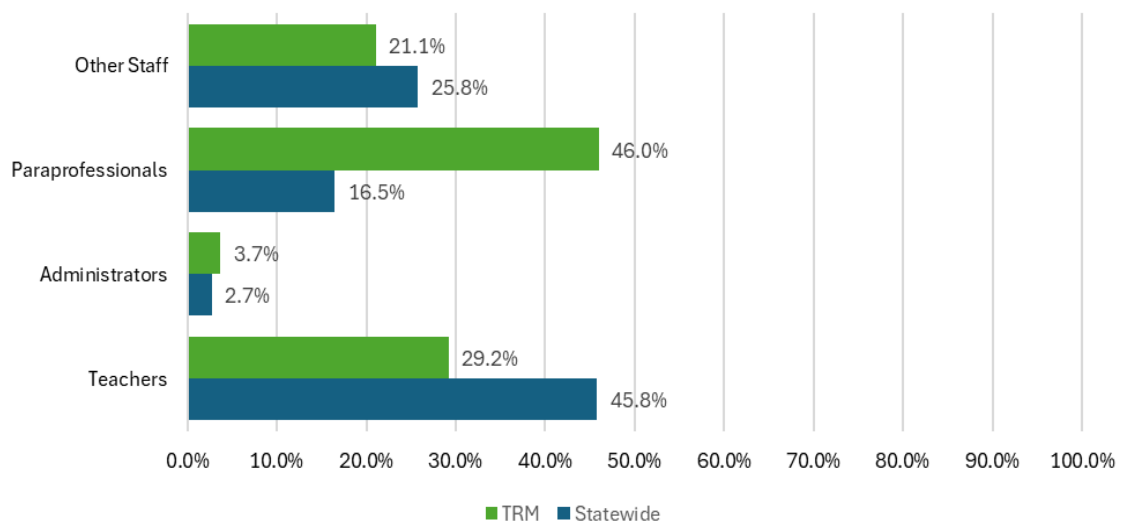
The chart below illustrates how the MCA data from the last two school years has been impacted by the growing Special Education population. When we isolate the data from students without an IEP, a clearer picture emerges: TRM’s students without IEPs are demonstrating consistent, steady growth year over year. This shows that while the overall results may appear static or in decline due to the inclusion of students with IEPs, the General Education student population is actually making notable progress. Additionally, within such a small school a change in one or two students can cause differences.

Figure 1. The number of students meeting standards in math, reading, and science over time; all Three Rivers Montessori students. Test scores showed a slight decrease from spring 2023 to spring 2024.



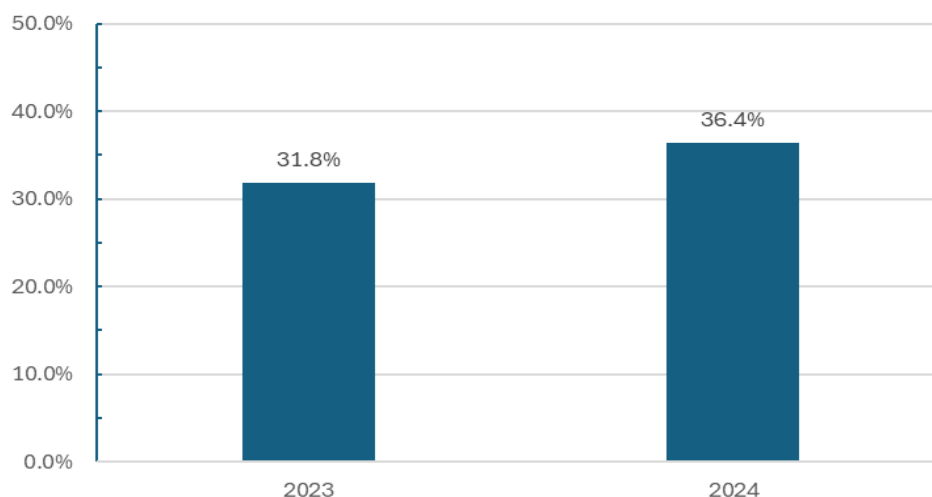
Three Rivers Montessori serves a disproportionate number of Special Education Students compared to area schools.

Figure 2. Three Rivers Montessori 2023 staffing profile. The number of paraprofessionals illustrates the differences in General Education and Special Education students served by Three Rivers Montessori, compared to state average. The percentage of SPED students served at Three Rivers has increased year-over-year.



When we consider the General Education population separately from Special Education students, we see markedly different results. From 2023 to 2024, MCA proficiency increased from 31.8% to 36.4%. This is an increase of 4.6% year-over-year.

Figure 3. The number of General Education students meeting standards in math, reading, and science over time. Student proficiency showed a 4.6% improvement year-over-year.



Although we have moved away from using MCA test scores as our assessment measure, it may also be worth noting that in the 2023-2024 school year, Three Rivers Montessori's MCA scores were near the median of MCA test scores for Osprey Wilds' authorized school rankings. Last year, we ranked 18th out of 34 schools authorized by Osprey Wilds. See Appendix A.

The number of students taking the Minnesota Comprehensive Assessments (MCA) can impact how results are interpreted. In smaller schools similar to Three River Montessori, results can be more volatile and less reliable for several reasons:

- **Higher Score Fluctuations** – In a small group, a few students' scores can significantly affect the overall percentage. For example, if only 10 students take the test and two perform poorly, that would bring the overall proficiency rate down by 20%, whereas in a large school, the impact of a few low scores is diluted.
- **Statistical Variability** – The smaller the sample size, the greater the margin of error. This means year-to-year changes in scores may not accurately reflect actual trends in student learning but could instead result from random variations.
- **Data Privacy Concerns** – When fewer than 10 students are in a tested group, results are often not reported publicly to protect student privacy. However, when a school has fewer than 50 students, trends can still be less meaningful due to individual student differences.
- **Demographic Influence** – In smaller schools, the unique characteristics of a small student population (such as a high number of students with disabilities or English learners) can make comparisons to district or state averages less useful.

For these reasons, many small schools use additional measures — like individual student growth data, classroom assessments, and other benchmarks—to get a clearer picture of student performance over time.

FastBridge Assessment Performance

We are pleased to share that the School Board and staff have observed strong results with our new assessment tool, FastBridge. The Minnesota Department of Education (MDE) recommends FastBridge as a literacy screening tool aligned with Minnesota State Standards. FastBridge is considered a strong assessment tool because it offers a comprehensive, multi-modal approach to screening, monitoring, and diagnosing student learning in reading, math, and social-emotional behavior (SEB), while also providing actionable data to inform instruction and interventions. The Board also prefers FastBridge because the tool lends itself more appropriately to the school’s educational philosophy and the Montessori Pedagogy, providing three different data points throughout the year.

For the current school year, the average student scored in the 44th percentile on FastBridge math and 45th percentile on FastBridge reading compared to the national average.

Table 1. 2024-2025 School Year FastBridge Test Scores, Three Rivers Montessori average student score percentile compared to national average.

	Reading	Math
All Students	45th Percentile	44th Percentile

When isolated from SPED students, we see General Education students ranking in the 47th percentile nationally for both Math and Reading in 2024-2025 FastBridge results.

Table 2. 2024-2025 School Year FastBridge Test Scores, Three Rivers Montessori average student score percentile for General Education and Special Education students when compared to national average.

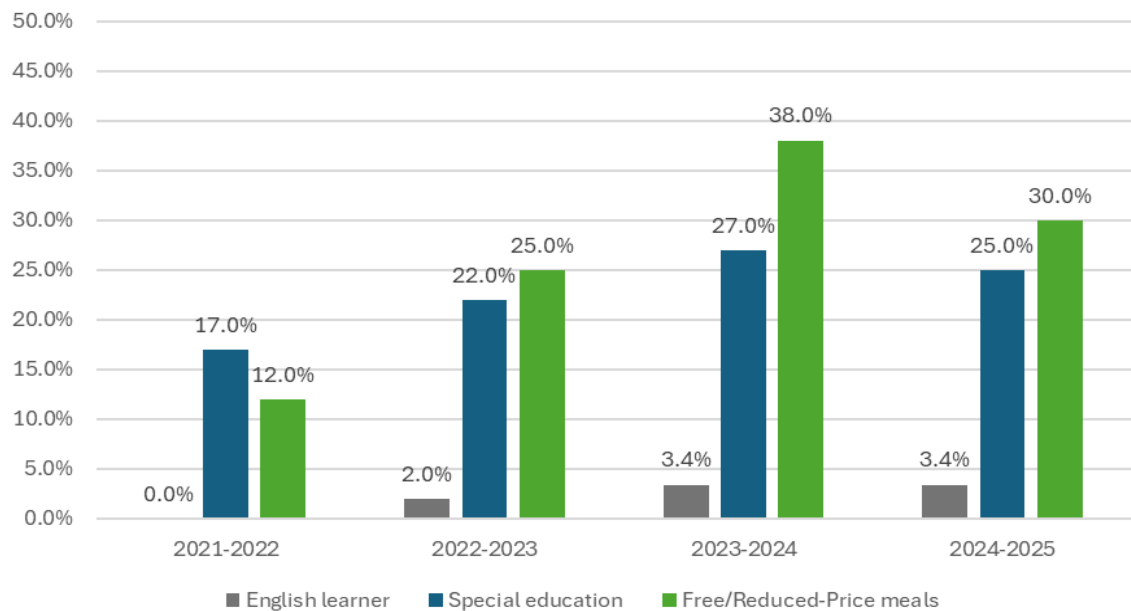
	Reading	Math
General Education	47th Percentile	47th Percentile
Special Education	33rd percentile	32nd percentile

Our Special Education teachers and Paraprofessionals work together with the General Education staff to ensure all students receive equitable learning opportunities within the Montessori classroom. During the course of this school year under the leadership of Dr. Henry all members of the school have formed a better understanding of how working together is a vital part of our schools success. Our Special Education teachers have been able to attend various trainings and collaborate with our Executive Director to help our students on Individual Learning Plans (IEPs) have access to testing and assessment tools that will help our teachers better formulate programming and tailor it to the ever changing needs of the students. Our Special Education program has also partnered with our MTSS team to assist with the identification of

students who may need extra support. Special Education Teachers will continue to use proven data driven programming to continue to support our students with Individualized Learning Plans (IEPs).

Three Rivers Montessori is also proud of all of the work our educators and Executive Director are doing to support other at-risk populations. For the current year, 30% of students meet the requirements to receive free or reduced lunch. A wealth of research indicates a correlation between poverty and academic outcomes, with students from low-income backgrounds often facing challenges that can impact their test scores. Recently, the state of Minnesota has compiled a report showing that MCA test scores are lower in schools with higher rates of poverty.¹

Figure 4. Year-over-year enrollment at Three Rivers Montessori for populations of interest - English learners, Special Education students, and students receiving free/reduced price meals.



The achievement gap has widened for low-income students in recent years.² The school was launched at the start of the pandemic. Research now is telling us that the pandemic exacerbated existing inequalities in schools across the country, with students from low-income backgrounds often facing greater disruptions to their education.

¹ “2023 State Test Score Results: Minnesota”. *Covid-19 School Data Hub*. Available at https://assets.ctfassets.net/9fbw4onh0qc1/5CdxcxjhPkKbboxZhNi6CJ/0acb8d1b76a50baa92fbffdfadb70b6e/CSDH_STSR_DataSeries_2023-10-MN-00_Minnesota.pdf

² Lewis & Kuhfeld. “Recovery still elusive: 2023–24 student achievement highlights persistent achievement gaps and a long road ahead “ Available at https://www.nwea.org/uploads/recovery-still-elusive-2023-24-student-achievement-highlights-persistent-achievement-gaps-and-a-long-road-ahead_NWEA_researchBrief.pdf

Three Rivers Montessori's team has a student-centered approach to education. Our team has worked hard to meet all of our students where they are at - supporting not just their academic growth, but also their socio-emotional wellbeing. We are proud to be an inclusive school that is able to meet the needs of our diverse learners.

Additional Academic Achievement Programs and Interventions

In response to low test scores, the Board tasked Dr. Henry with introducing additional interventions during the 2024-2025 school year to address academic challenges.

MTSS Teams

MTSS (Multi-Tiered System of Support) is a framework used in education to provide varying levels of support to students based on their individual needs. It integrates academic, behavioral, and social-emotional supports in a structured, tiered system. Students are identified for the MTSS (Multi-Tiered System of Supports) program through a combination of data-driven assessments, teacher observations, and team-based decision-making.

1. All students are assessed at regular intervals (three times per year) using Fastbridge.
2. We identify students who may be at risk academically, behaviorally, or socially/emotionally.
3. The MTSS team reviews data from:
 - Screener scores
 - Grades
 - Attendance records
 - Behavioral referrals
 - Progress monitoring data
4. Students who perform below benchmark or show concerning trends are flagged for further review. Teachers can refer students based on classroom observations and concerns not captured in screening data, such as:
 - Difficulty following instructions
 - Frequent absences
 - Struggles with peer relationships
 - Gaps in foundational academic skills
5. The MTSS team will meet to review data, discuss student needs, and determine the appropriate level of support (Tier 1,2, or 3). Once interventions are put into place the students identified will continue to be monitored for progress and

re-assessed on a regular basis.

6. The MTSS team will report academic progress, outcomes, and solutions to the School Board quarterly.

Three Rivers Montessori has successfully implemented MTSS with fidelity during the 2024-2025 school year. Our MTSS team, composed of teachers and support staff, meets at least twice a month to review data for students identified as needing additional academic support. Together, we collaborate to provide appropriate interventions, continuously analyze progress, and make adjustments as needed. This ongoing cycle ensures that each student receives the targeted support necessary for success.

Throughout this year, we've seen significant growth in the students identified through the MTSS process, reflecting the effectiveness of our data-driven, team-based approach. These efforts have been reflected in our FastBridge testing scores (shown above) and we are looking forward to the next assessment period in the spring.

Title 1 Reading Grant & Intervention

With 30% of Three Rivers Montessori's students meeting criteria for free and reduced lunch, the school receives Title I funding which allows schools with high percentages of low-income students to improve academic achievement, particularly in reading and math. The school has used these funds to focus on reading interventions for students.

Read at Home Program Launch

Throughout this school year Three Rivers Montessori has been holding activities to encourage students and families to read at least 20 minutes per day at home. By reading at home together every day, families can stimulate and strengthen their child's language and literacy skills. Games, contests, and enthusiasm are geared toward this effort.

Launch and Oversight of Late Fall Reading Corp Program

TRM's Title One coordinator participated in required training and the steps to launch our program, and selected the appropriate students for the program.

Reading Volunteer Coordination

TRM made an effort this year to connect more volunteers with each classroom for additional time spent reading as teachers deem appropriate.

Reading Interventions with E2 (4th, 5th, 6th grade)

After winter Fastbridge testing, our Title 1 Reading Coordinator started daily small reading groups with all E2 students not meeting reading standards (not including those

receiving special education services). Every student in this classroom not meeting standards is monitored weekly for progress. Results are currently on track and showing improvement.

AmeriCorps Grant for a Reading Corps Tutor

For the 2024-2025 school year, The Executive Director applied for and received an AmeriCorps grant for a Reading Corps tutor to work at our site. Our $\frac{2}{3}$ -time tutor works with 10 students at a time and began tutoring in late November 2024. Early success shows that 6 of 10 participating students have already graduated, as they now meet standards. Room for additional students allowed new students into the program. Individual tutoring of ten K-3 students is currently happening. Year-to-date, Reading Corps has provided 451 hours of support to students (see Appendix B).

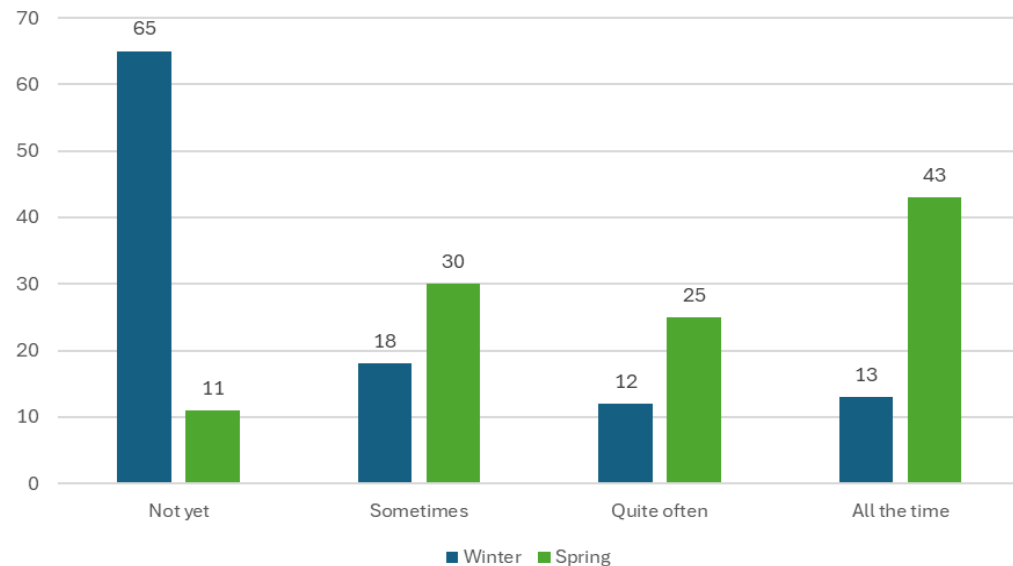
TRM applied for a Reading Corps tutor for next year to meet additional needs at our location. Our application for one full-time tutor has been awarded for the 2025-26 school year. At full capacity we will tutor around 15 K-3 students at a time.

Nurtured Heart SEL

The School Board places a large emphasis on the connection between student academic growth and social emotional learning. Throughout the 24/25 school year TRM, with the guidance from the Board, have implemented the Nurtured Heart SEL program for all students. We have seen our students learn and grow in their understanding of the importance of treating all with kindness, respect, and understanding. The Nurtured Heart program works in conjunction with the Montessori Pedagogy and enhances the well rounded learning environment that a Montessori classroom provides.

Nurtured Heart is a social-emotional learning (SEL) strategy focused on building strong relationships, promoting positive behaviors, and transforming how adults interact with children—especially those who may be intense or challenging. It's often used within MTSS frameworks to support behavior and emotional regulation, particularly in Tier 1 and Tier 2 settings.

Figure 5. Student responses for the mission-related goal “I know what compassion is and I can explain it to someone else.” showed significant improvement from winter to spring.



Dr. Henry’s level of experience and her fresh perspective has strengthened the School Board’s working relationship and provided new ideas for academic growth.

Environmental Education

Recognizing Osprey Wilds’ mission of environmental stewardship, the Board would also like to provide additional background on the environmental education highlights and accomplishments we have seen in environmental education and efforts at TRM.

- Three Rivers Montessori maintains a butterfly garden, flower garden and herb garden, along with the care of many indoor plants. We have had parent volunteers support from some dedicated families to help with our beautiful gardens at TRM. In 2022 we were awarded the Beautification Award by the City of Elk River for our efforts to use flora to bring beauty to our school grounds.
- Three Rivers Montessori has implemented Environmental Education as a Specials class in classrooms. Some of the topics covered have included:
 - Biomes
 - Species of animals and their life cycles
 - Parts of plants
 - Classes have worked together to harvest rain with our rain barrels

- Students have created public service announcements to bring awareness to environmental issues
- Teachers and students together are continually working to cut down on the food waste that comes with the State's free lunch program.
- TRM has implemented a school wide recycling program, where students are involved in recycling all recyclable materials.
- Students have brought home a native plant species to plant in their yard or garden.

Overall, Three Rivers Montessori has embraced environmental education and stewardship as a part of our vision at Three Rivers Montessori. We are aligned with Osprey Wilds' mission of instilling a connection and commitment to the environment in people of all communities through experiential learning.

Conclusion

In addition to MCA testing, the school has implemented supplemental monitoring through tools such as FAST, FastBridge, and NWEA to further support student progress tracking and instructional decision-making.

When the Board began the search for a new Executive Director (ED), we prioritized a leader who could address student achievement, increase enrollment, engage with the community, and oversee financials.

The Board directed the Executive Director to oversee our academic program and to research and implement several data-driven programs this year. Several of the programs have been adopted and the school has seen great progress over the course of this school year.

- FastBridge Assessments
- MTSS
- Title 1 Reading Interventions
- AmeriCorps (Reading Corps)
- Nurtured Heart SEL

Academic Achievement is a goal for the Executive Director's annual review. The Board has directed the Executive Director to provide evidence of progress toward these goals. The Executive Director provides a report on his/her goals at each board meeting, including what he/she is doing to support and enhance academic achievement. The Executive Director will continue to report on progress towards academic goals and other relevant information at each School Board meeting as directed by the School Board. School committees (academic, finance, etc.) will be available for questions concerning any information brought to the School Board by the Executive Director. This ensures complete clarity and further supports the Boards commitment to academic and financial governance.

This past year, the Board also recognized the need for more comprehensive data and proactively partnered with Dr Henry to ensure this work was underway—well before any notification of Osprey Wilds' intent not to renew our contract. Together, the Board and Executive Director have made significant progress, as outlined above.

However, in response to Osprey Wilds' concerns the Board has implemented the following steps to better align with Osprey Wilds' contractual requirements and to fulfill our obligation to be transparent with both our school community and stakeholders:

- Adding a standing “Academic Achievement” item to the board meeting agenda to ensure regular, in-depth discussion and monitoring.
- Requesting and reviewing detailed data reports from administration and instructional leaders at least quarterly.
- Participating in training sessions focused on understanding academic data and using it to guide strategic governance decisions.
- Collaborating with administration to establish benchmarks and goals aligned with state and internal assessment results.
- Establishing a process for annual academic performance review to be presented publicly and submitted as part of the board's self-evaluation.

Looking to the future, the Board has identified a need to expand enrichment programs, including Environmental Education, Arts, Music, and Physical Education.

Collectively, these efforts are part of a larger commitment to improve governance of academics, and support sustainable school leadership that is tied to student achievement. We respectfully ask for renewal - not based on perfection - but based on our demonstrated commitment to meaningful change, and the foundational progress already underway to ensure long-term academic success and strong school leadership.

Looking ahead to the next contract period, the Board remains committed to ensuring school leadership implements the right tools and maintains checks and balances. The Board will continue to focus on improving student outcomes in reading, math, and environmental education. With the current programs and interventions in place, and our mindset of continuous improvement, we are confident Three Rivers Montessori will continue to grow and become a respected and established part of the academic community.

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SECTION 2. Fiscal Management

The Board of Directors has demonstrated increased oversight and guidance on fiscal responsibility.

The Three Rivers Montessori Board of Directors is in compliance with all governance requirements in regards to fiscal management. Current policies relating to fiscal management include:

- 701 Internal Controls Policy
- 702 Purchasing Policy
- 703 Procurement Policy
- 704 Credit Card Policy
- 708 Fund Balance Policy
- 709 Electronic Funds Transfer Policy
- 710 Capital Assets Policy
- 902 Acceptance of Gifts/Donations/Fundraising Policy

The School Board thoroughly reviews financial statements via the Finance Committee meetings held on the second Wednesday of each month. The following Tuesday the School Board reviews and approves all financials at the monthly board meetings.

Financial Audit Compliance

“Repeat findings in external financial audits. Three Rivers Montessori has had a recurring legal compliance finding in its external financial audits for FYs 2023 and 2024 related to the late payment of claims, in violation of MN Stat. § 471.425, subd. 2. This statute mandates that charter schools must pay each vendor obligation according to the terms of the contract or, if no contract terms apply, within 35 days of receipt. Although the School established a corrective action plan (CAP) in 2023 to address this issue and implement policies and procedures to ensure timely payment of invoices, it was unable to resolve this finding and it was repeated in 2024, the most recent audit.”

Thank you for your continued oversight and partnership in supporting the growth and compliance of Three Rivers Montessori. We acknowledge and take seriously the repeat audit finding concerning the late payment of claims in violation of MN Stat. § 471.425, subd. 2, as identified in both our FY 2023 and FY 2024 external financial audits.

While we did establish a corrective action plan (CAP) in 2023 aimed at addressing this issue—including updating internal procedures, increasing administrative oversight, and adjusting our invoice approval workflows—unfortunately, the implementation did not fully mitigate the issue. We recognize that timely vendor payments are a legal and operational priority.

The School Board understands that repeat findings compromise not only compliance but also the trust placed in us by our authorizer and community. Please be assured that we are committed to continued financial compliance.

We appreciate your continued guidance and welcome any additional recommendations you may have to help us align fully with statutory requirements.

Enrollment

“Insufficient enrollment. Per Section 10.2 of the charter contract, Osprey Wilds may not renew the School’s charter contract if the School has insufficient enrollment to successfully operate a charter school. TRM has operated at a deficit in each of the last two fiscal years (FY 2023 and 2024) demonstrating the school’s failure to maintain sufficient enrollment for its operations.”

When the school board interviewed for the next Executive Director, we were looking for someone who could add value in the areas of student achievement, enrollment, and financial management.

With the benefit of hindsight, the Board would like to acknowledge two unforeseen challenges to enrollment, and directly address how we have navigated these challenges to increase enrollment.

Enrollment Challenge: Transportation

During the school year 2022-2023 Three Rivers Montessori was notified that our bussing schedule would dramatically change the start time of Elk River area schools the following year. Starting time would change from 8:10 am to 7:30 am. Despite lobbying the local school district, we could not convince them to offer us a better bussing schedule. Our own private transportation would cost approximately \$200,000 per year, so our only option was to accept the new start time.

The new start time began in fiscal year 2023-2024. A significant number of families objected to the new start time and left the school according to feedback received from families. In addition, some families express unhappiness with the communication style of the executive director and left the school for that reason.

Many of our families remain committed to the school despite the early start time, and we have focused our recruiting on families whose schedules work with our start time. The school has already increased enrollment from 99 to 122 ADM at the start of the 2024-2025 School Year. We anticipate enrollment for 2025-2026 to be in the range of 136-140 ADM.

Enrollment Challenge: Changes in Leadership

As noted above, leadership volatility has impacted our enrollment. In addition, several families have left because of the communication style of the prior Executive Director. Between the 2022-2023 and 2023-2024 school year the negativity surrounding leadership began to have an effect on re-enrollment rates for the 2023-2024 school year. We are pleased with Dr Henry's ability to build relationships with students and families, and attribute our growing enrollment to her effective leadership.

The Board recognizes their responsibility to ensure that school culture remains positive. The Board designated a committee composed of board members to investigate all staff and parent complaints with the involvement of our HR consultant who did a thorough investigation into the issues surrounding the negative culture during the 2022-2023 school year. The Board met with the Executive Director and staff members to go over findings at a staff meeting.

In the 2023-2024 school year, the board continued prioritizing transparent and honest feedback in a continued effort to strengthen relationships within the school. The Board worked with the Executive Director to share a parent survey and a staff survey in the fall of 2023 and again in the spring of 2024. Overall, results from the survey were overwhelmingly positive and provided the Board with an objective measure that the school has been making progress with stakeholders.

In summary, during the summer of 2023, Three Rivers Montessori saw continued enrollment from new families. However, the school experienced departures due to changes in the bussing schedule and disagreements with school leadership. As a result, the influx of new families in the fall of 2023 was insufficient to fully recover the enrollment deficit.

The Board recognized the leadership change in June 2024 as an opportunity to search for an Executive Director who could best meet the school's needs. While past Executive Directors excelled in certain areas, Three Rivers had struggled to find a leader with the necessary academic and financial expertise to sustain a public charter school. Throughout this school year, the Board has worked diligently to implement stronger checks and balances (see updated policies) to ensure future responsible growth.

To increase Three Rivers Montessori's community outreach, the Board has partnered with the Executive Director to introduce several opportunities for community involvement and is actively working on initiatives to improve the school's visibility. Some of these efforts have included:

- A strategic communication plan was planned in partnership between the Board of Directors and Dr Henry, introducing her to families and on social media (for sample, see Appendix C).
- Introducing enrolled families to Dr Henry in-person at our summer "Popsicles and Pages" event. Families joined us at a local park and enjoyed a book exchange, and popsicles

donated by Johnny Pops. Students voted on our new mascot at the event and had the chance to reconnect with peers ahead of the start of the school year.

- Hosting a booth at Elk River Fest to engage with the community. Board members and staff members served as volunteers.
- Additional social media presence, such as our “Raccoons Read” initiative encouraging families reading at home (see Appendix C).

As a result, enrollment for the 2025-2026 school year has increased from a low of 99 ADM at the start of FY 24, to 118 ADM as of today. We credit this increase to the collaborative efforts of both the Board and the Executive Director.

Moving into the next Charter contract, the Board will continue to make calculated and data-driven decisions when concerning future goals and enrollment. The Board Meeting minutes from the past two years paints a clear picture of an active board providing financial oversight, with a focus on enrollment. By using past enrollment data and our 2025-2026 lottery enrollment, we are encouraged by our enrollment funnel. We project the following enrollment over the next three years:

Table 3. Expected enrollment projections, current FY through FY29.

	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029
Kindergarten	29	30	30	30	30
1st Grade	21	17	30	30	30
2nd Grade	14	23	17	30	30
3rd Grade	23	19	23	17	30
4th Grade	9	26	19	23	17
5th Grade	12	12	26	19	23
6th Grade	8	5	6	13	8
Total ADM	122	132	151	162	168

**Assumptions based on past enrollment trends: Enrolling 30 kindergarten students each year. The school retains approximately 50% of students from 5th to 6th grade, as some families elect to enroll in other area middle school options which begin at 6th grade.*

It is important to note that our financial budgets and projections are approached with a level of conservatism that exceeds our enrollment expectations. While the enrollment numbers outlined above reflect a realistic and data-supported trajectory for growth, our financial planning is intentionally more cautious. This ensures fiscal stability even in the event that enrollment does not meet projections. By budgeting below our anticipated ADM, we safeguard the school’s financial health and maintain flexibility to adapt as needed.

Table 4. Conservative ADM projections used by Creative Planning, current FY through FY29.

	2024-2025	2025-2026	2026-2027	2027-2028	2028-2029
Total ADM	118	145	145	145	145

The Board's financial projections are conservative. The Board of Directors has directed our financial partner, Creative Planning, to work directly with the Executive Director. To enhance clarity and strengthen checks and balances, the Board of Directors has granted our financial planners the authority to report directly to the board with any concerns outside the Executive Director's knowledge.

Overall, in 2025 the change in fund balance shows a strong recovery with a notable increase of \$135,222.

Table 5. Five Year Financial Projections.

	<u>2024-2025</u> <u>Original</u> <u>Budget</u>	<u>2024-2025</u> <u>Working</u> <u>Budget</u>	<u>2025-2026</u>	<u>2026-2027</u>	<u>2027-2028</u>	<u>2028-2029</u>	<u>2029-2030</u>
Enrollment Projections	125	118	145	145	145	145	145
Federal Special Education							
303 Federal Contracted Services < \$25,000	7,890	0	0	0	0	0	0
366 Travel, conferences and staff training	5,938	5,748	7,204	7,348	7,495	7,645	7,798
401 Supplies - Non Instructional	422	409	512	522	533	543	554
405 Non Instructional Software and License Fees	1,682	2,352	2,948	3,007	3,067	3,128	3,191
433 Individualized Instructional Materials	7,081	6,727	8,431	8,600	8,772	8,947	9,126
466 Instructional Technology Devices	0	128	160	164	167	170	174
Food Service Program Expenses							
Salaries and Wages	28,200	11,930	14,953	15,252	15,557	15,868	16,186
Benefits	4,470	4,304	5,395	5,503	5,613	5,725	5,840
Purchased Services	1,561	1,561	1,592	1,624	1,656	1,689	1,723
Supplies and Materials	4,254	3,072	3,850	3,927	4,006	4,086	4,168
Food and Milk	101,779	96,079	120,424	122,833	125,290	127,795	130,351
Dues, Memberships, Other Fees	1,130	1,066	1,336	1,363	1,390	1,418	1,447
Community Service Program Expenses							
Salaries and Wages	42,200	37,205	46,632	47,565	48,516	49,486	50,476
Benefits	6,914	6,123	7,674	7,827	7,984	8,144	8,307
Purchased Services	510	510	520	531	541	552	563
Supplies and Materials	893	893	911	929	948	967	986
Pre-K Salaries and Wages	53,856	40,000	0	0	0	0	0
Pre-K Benefits	9,170	6,554	0	0	0	0	0
Pre-K Supplies and Materials	1,530	1,530	0	0	0	0	0
Total Expenditures	2,416,392	1,932,094	2,366,400	2,429,192	2,538,777	2,574,495	2,631,333
	<i>2,416,392</i>	<i>1,932,094</i>	<i>2,366,400</i>	<i>2,429,192</i>	<i>2,538,777</i>	<i>2,574,495</i>	<i>2,631,333</i>
Annual Surplus (Deficit)	(111,374)	135,223	113,406	97,643	49,451	38,889	26,606
Beginning Fund Balance	83,487	83,487	218,711	332,117	429,760	479,210	518,099
Ending Fund Balance	(27,886)	218,711	332,117	429,760	479,210	518,099	544,706
	<i>Per Audit</i>						
Fund Balance Percentage of Annual Total Expenditures	-1.2%	11.3%	14.0%	17.7%	18.9%	20.1%	20.7%

Table 6. Cash Flow Projection Summary 2024-2025 School Year.

Period Ending	Cash Inflows (Revenues)						Cash Outflows (Expenditures)				Cash Balance
	State Aid Payments	Federal Aid Payments/ Food Service	Other Receipts	Line of Credit Draw	Prior Year State and Federal Receivable	Total Receipts	Salaries and Benefits (Net)	Other Expenses - AP	Payments Made on Line of Credit	Total Expenses	
										<i>Beginning Balance</i>	\$ 78,232
Jul 31	102,949	-	2,975	-	5,198	111,122	42,529	74,610	-	117,139	72,215
Aug 31	134,115	-	1,680	-	198,297	334,092	43,315	82,094	-	125,409	280,898
Sept 30	129,220	-	14,985	-	64,128	208,333	66,426	148,481	-	214,908	274,324
Oct 31	106,095	10,246	11,201	-	28,195	155,737	77,178	95,119	125,000	297,297	132,763
Nov 30	168,834	-	13,800	-	9	182,643	68,347	91,390	-	159,737	155,669
Dec 31	123,409	16,969	12,133	-	4	152,515	67,385	112,394	-	179,779	128,405
Jan 31	124,015	19,810	12,154	-	3,864	159,844	69,552	100,243	-	169,795	118,454
Feb 28	149,469	-	12,202	-	1,593	163,264	74,871	86,422	-	161,292	120,425
Mar 31	130,042	9,176	11,892	-	3,244	154,354	85,770	84,260	-	170,030	104,749
Apr 30	126,700	18,986	11,892	-	15,457	173,035	85,770	84,260	-	170,030	107,754
May 31	126,852	9,176	11,892	-	-	147,920	85,770	84,260	-	170,030	85,645
June 30	126,771	9,176	2,000	-	-	137,947	55,770	64,260	-	120,030	103,561
Totals	1,548,471	93,540	118,805	-	319,989	2,080,806	822,684	1,107,792	125,000	2,055,476	103,561
Projected Cash Flow for FY2025-2026											
Jul 31	125,000	5,000	4,000	-	10,000	144,000	40,000	71,908	-	111,908	135,653
Aug 31	125,000	5,000	2,000	-	71,957	203,957	45,000	100,000	-	145,000	194,610
Sept 30	140,000	10,000	7,000	-	53,968	210,968	90,000	100,000	-	190,000	215,578
Oct 31	140,000	20,000	7,000	-	35,979	202,979	90,000	100,000	-	190,000	228,557

Assumptions: 10% State Aid Holdback

This financial report is prepared in a modified format in that they exclude footnotes and required supplementary information in order to be considered a full set of financial statements. The excluded portions will be included in the School's fiscal year end financial statements. Creative Planning is not a licensed CPA firm and no CPA provides any assurance on this financial report.

Lease Obligations

The school also has high lease obligations threatening both its near-term financial health and long-term viability. The lease agreement extends through 2046, with a total future liability of over \$3.3 million. Lease payments and related expenses are a major financial burden, especially without adequate enrollment to support cash flow. The General Fund balance dropped significantly since FY2022, and the school has had to rely on a line of credit to pay its bills, suggesting a lack of liquidity to cover expenses.

This school year, the Board of Directors has worked closely with our leaseholders, Beacon22, to adjust the lease in a way that best supports the school and maximizes lease aid. Beacon22 has become a trusted partner, demonstrating a strong commitment to the school's success. Together, the school and Beacon22, with the Board of Directors' collaboration, has signed a new lease agreement that will serve the school's needs for the coming years. Beacon22 will collaborate with the Board of Directors to ensure that as enrollment at the school grows, the necessary steps are taken to provide the school with the space and resources needed to fully realize its mission: empowering students to reach their full potential through Montessori education.

Additionally, Appendix G includes a letter of support provided by the COO of Beacon22 recommending our agreement be renewed, saying "our continued support through an affordable rent solution has contributed to this positive outlook, but the credit for this turnaround primarily belongs to the school's leadership and their diligent efforts to strengthen operations." and that "as their landlord, we have witnessed firsthand their commitment to fiscal responsibility and operational improvement." We believe that their support is a powerful testament to the progress the school has made and we are grateful for their continued partnership.

Expenditures

"The charts below demonstrate that general fund expenditures continued to rise while enrollment declined by more than 47 average daily membership (ADM) from 2023 to 2024."

While 2024 FY saw lower enrollment than in prior years, the Board of Directors tasked the Executive Director with focusing on enrollment. We have seen a strong increase in ADM YoY from 2024 into the current school year.

Table 7. FY 2021-2024 General Fund Expenditures Per ADM

	2021	2022	2023	2024	2025
General Fund Expenditures	\$1,095,648.4	\$2,258,585.0	\$2,134,518.0	\$2,017,434.0	\$1,932,094
ADM	84.42	158.72	146.43	99.21	118

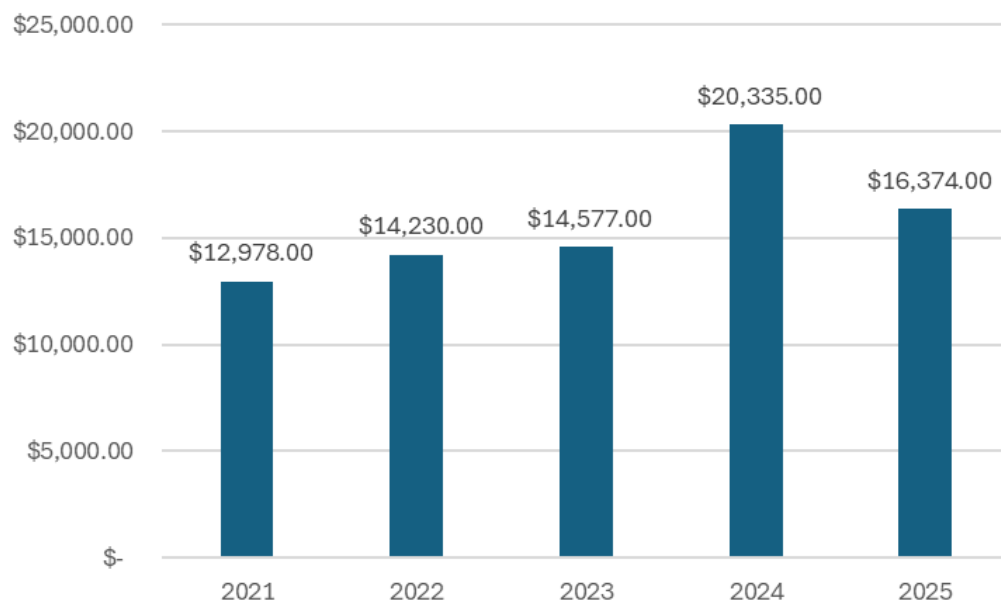
General Fund Expenditures / ADM	\$12,978.54	\$14,230.00	\$14,577.05	\$20,334.99	\$16,373.68
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The Board of Directors expects the Executive Director to serve as the school's business director, and since Dr. Paula Henry's hiring, there has been increased collaboration between the ED, the board, and stakeholders on fiscal management and decision-making.

Prior to Osprey Wilds raising these concerns, the Board had recognized that the financials were not sustainable. We partnered with the Executive Director to scrutinize all expenditures to take serious action to cut expenses at the start of this school year. **We were able to cut an estimated \$220,000 from the budget for FY25. We expect to finish the year with a 135,223 surplus as a result of these efforts.**

As you can see, the budget cuts resulted in a reduction in general fund expenditures per ADM (Figure 6).

Figure 6. General fund expenditures per ADM, 2021 through current fiscal year.



Additional Financial Oversight from Board of Directors

As part of our ongoing partnership and in response to the renewal process, the Board of Directors of Three Rivers Montessori has taken deliberate and proactive steps to strengthen our operations and governance. We are committed to maintaining transparency, fiscal responsibility, and continuous improvement in all areas of school management. To that end, we have instituted a comprehensive, standing review of the following key focus areas at every board meeting:

- Executive Director Performance and Updates
- Financial Management
- Board Training and Reflection
- Governance and Policy Updates

Additionally, we've enhanced our financial oversight by introducing new governance and increasing the frequency of budget monitoring.

Hiring and Staffing Policies

At the start of the 2024-2025 School Year, the Board has directed the Executive Director that all new positions and salaries must be approved by the Board of Directors by vote.

Salary and Benefits Policies

Since the start of the School Year, the board has partnered with the Executive Director to develop a salary schedule based on market pay data. The board has completed a first reading of an updated Pay Scale policy, which outlines acceptable pay rates for all teacher and staff positions. We have completed a compensation analysis to build in increases to bring any existing staff below the new pay scale up to the pay scale, in conjunction with the cost increase to insurance benefits for the coming year.

Additionally, the board has completed a first reading of the updated Time Off Policy updates. The proposed policy will save the school money for the 2025-2026 school year.

Collectively, the policy updates above will ensure the board provides oversight of the Executive Director position and that all salaries and benefits at TRM are aligned with area schools.

Procurement Policy Update

The Procurement Policy was updated at our July 16, 2024 meeting. Under the new policy, bids are required for expenditures estimated at or above \$100,000 per year. For purchases of goods using state funds, purchases of \$5,000 or more require board approval.

Additional Board Training

In the spirit of continuous improvement, the Board is scheduling additional board training this summer concerning Financial Management and Oversight. We look forward to continuing to learn about safeguarding the financial wellbeing of the school.

We appreciate Osprey Wilds' continued guidance and collaboration. These steps reflect our dedication to continuous improvement and ensuring the long-term success of Three Rivers

Montessori. We look forward to building on this progress, as we collectively share a mindset of continuous improvement.

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SECTION 3. School Board Governance; Compliance with Charter Contract and Legal Requirements

Charter Contract Compliance

Non-compliance with the charter contract. As outlined in Section 2.2 of the Operations Performance Evaluation, TRM received four notices of intervention over the course of the contract period for non-compliance with the charter contract and non-compliance with legal requirements. Multiple notices of intervention is unusual for any school, let alone a school in its first operational period. The first two notices of intervention were issued prior to when the school began serving students. (This was a first for OW as an authorizer as it had never before been required to intervene so early in a school's life cycle.) The board has a responsibility to ensure that these interventions are appropriately and permanently resolved.

In addition to ensuring that interventions are resolved, the board must ensure proper oversight so that intervention by the authorizer is not warranted. This pattern of non-compliance with statute and the charter contract represents a breach of the Board's fiduciary duties and demonstrates inadequate board capacity to govern.

At the start of the current fiscal year, to our knowledge, there were no outstanding Notices of Concern from Osprey Wilds. If there had been, we would have been actively working on them.

Specifically, the background check policy is strictly adhered to for all staff, volunteers, and board members. We have had no additional concerns raised about background check compliance.

We appreciate the recent feedback from Osprey Wilds, and our Board Members are active in improving the areas cited as a concern by the authorizer. As noted above, the most recent notice of concern or notice of deficiency from Osprey Wilds was received on July 1, 2022 and was closed on November 30, 2023. The Board of Directors took immediate corrective action on prior concerns. There have been no further notices of concern or notices of deficiency since then.

We believe that all formal concerns raised by Osprey Wilds have been addressed. The Board of Directors looks forward to continued partnership with Osprey Wilds during the next authorization period and values any additional feedback from the authorizer.

Executive Director Performance Review

State law requires that the Board of Directors establish a formal performance evaluation process for the school leader in accordance with MN Stat. §124E.07 Subd. 6, and implement that process in accordance with MN Stat. §124E.12 Subd. 2(a). While the Board established a detailed Director Performance Evaluation Policy (approved January 17, 2020) that outlines activities associated with the annual evaluation cycle, there is no evidence that the Board carried out the process described in policy. Further, review of meeting minutes indicates the

Board evaluated its school leader in FY23 and FY24, but not the initial two years of the contract period.

Thank you for your feedback and continued support in helping Three Rivers Montessori maintain accountability and excellence in governance and school leadership. We acknowledge the compliance concern related to the Board of Directors' obligation to formally evaluate the school leader, as outlined in MN Stat. §124E.07 Subd. 6 and §124E.12 Subd. 2(a).

While the Board did adopt a comprehensive Director Performance Evaluation Policy on January 17, 2020, we recognize that this policy was not fully implemented during the initial years of the school leader's contract, and that documentation verifying consistent adherence to the process is lacking in FY21 and FY22.

This oversight was due largely to turnover in the Executive Director Position. We regret this oversight and understand the importance of both fulfilling statutory requirements and ensuring consistent, transparent leadership evaluation practices. We would appreciate any input Osprey Wilds has on whether Three Rivers should retrospectively complete these prior year performance reviews.

We recognized this as an area of improvement long before this was raised as a concern by the Authorizer. At the start of the 2023-2024 School Year, the Board developed the Review Committee who collaborates with the Executive Director on his/her goals and performance evaluation.

Table 8. Executive Director performance review timeline (excerpt from Performance Review Document; see Appendix G).

Timeline	Objective	Date
Summer or Early Fall	Review committee and Executive Director review job description, evaluation process, forms, & timelines.	August
	Review committee and Executive Director identify acceptable supporting documents, information, evidence, and data to be used to measure performance.	August
	The Review committee and Executive Director create goals and/or identify standards based on school priorities that are measurable and achievable in twelve months.	August
Spring	Each school board member receives the end-of-year summative evaluation form & the evaluation criteria.	Feb
	Executive director may complete a self-evaluation, with supporting documents, to be provided to the school board.	Feb
	Executive director makes end-of-year progress reports to the school board related to the goals and standards.	April
	School board members discuss the Executive Director's performance on each goal	April

	and/or standard. The school board may request an opportunity to prepare for the summative evaluation without the Executive Director's presence, but the school board cannot exclude the Executive Director.	
	At the evaluation meeting, the school board chair leads the school board's review of the Executive Director's performance. The school board may close the meeting unless the Executive Director requests that the meeting be open. The school board should require that this request be in writing.	April
	At the next open meeting, the school board summarizes its conclusions regarding the summative evaluation, in compliance with Minnesota's Open Meeting Law.	May
	The final written summative evaluation form is placed in the Executive Director's personnel file.	May

The Review Committee also established objective scoring criteria for all Executive Director goals. The Board has an agenda item for the Executive Director to report on progress made on these focus areas at each board meeting. See Appendix G for current year focus areas and full review criteria for Dr Henry.

A clear timeline has been established for all future evaluations, with documentation milestones built in. All relevant discussions, performance benchmarks, and outcomes will be recorded in board meeting minutes and securely archived.

We appreciate Osprey Wilds' role in holding our school to high standards and remain committed to ensuring that our leadership evaluation practices reflect both state law and our shared values of transparency, accountability, and continuous improvement.

Required Charter School Policies

In addition, OW reviewed the School's policies on file and the ones posted on the TRM website. The School is missing the following statutorily or contractually required policies, or has not submitted them to Osprey Wilds:

- School Cell Phone Policy
- Student Journalist Policy
- Library Materials Policy
- Records Retention Schedule
- Title IX Policy
- Language Instruction Educational Program (LIEP) Plan
- World's Best Workforce (WBWF)

Additional review of policies identified several that are out of compliance with statutory requirements:

- Public Data Access Policy
- Data Subject Rights and Access Policy
- Nepotism Policy
- Admission Policies & Procedures (including the Lottery Policy and Early K/1 Admission Policy)
- Personnel Policies (i.e. Employee / Staff Handbook)

We had no notices of deficiency or notices of concern regarding our governance. Nonetheless, at the direction of the Board of Directors, the Executive Director began proactively updating and revising policies and handbooks prior to the 2024-2025 school year.

101 Admissions Policy and 106 Early K1 Admissions Policy (meets requirements for “Admission Policies & Procedures”).

Date approved: 2/18/2025

212 Board Data and Privacy Policy (meets requirements for “Public Data Access Policy” and “Data Subject Rights and Access Policy” listed above)

Date approved: 11/19/2024

407 Nepotism Policy

Date approved: 11/19/2024

512 School-Sponsored Student Publications and Activities (“Student Journalist Policy” above)

Date approved: 1/21/2025

513 Student Cell Phone and Electronic Device Policy (“School Cell Phone Policy” above)

Date approved: 2/18/2025

602 Library Materials Policy

Date approved: 2/18/2025

Records Retention Schedule

Date approved: In process

405 Title IX Policy

Date approved: 3/25/2025

Language Instruction Educational Program (LIEP) Plan

Date approved: To be reviewed in June 2025

World's Best WorkForce (WBWF) Strategic Plan

Date approved: 2/18/2025

Personnel Policies (i.e. Employee / Staff Handbook)

Updates approved: 8/20/2024

Beyond the minimum governance requirements outlined in our charter school agreement, the board has also developed or updated the following new governance this year:

- 102 Application, Enrollment and Lottery Policy (updated 2/18/2025)
- 105 Whistle Blower Policy (updated 9/17/2024)
- 203 Board Self Reflection Policy (updated 3/25/2025)
- 211 Public Participation in Board Meetings (updated 11/19/2024)
- 213 Open and Closed Meetings (updated 11/19/2024)

- 214 School Board Meeting Minutes (updated 11/19/2024)
- 301 School Director Performance Evaluation (updated 2/18/2025)
- 501 Dress Code Policy (updated 10/22/24)
- 502 Student Discipline and Behavior Policy (adopted 11/19/2024)
- 505 Pledge of Allegiance (updated 09/17/2024)
- 510 Student Promotion and Retention Policy (updated 02/18/25)
- 511 Bullying Prohibition (adopted 11/19/2024)
- 513 Student Cell Phone Policy (adopted 2/18/2025)
- 803 Non-Sectarian Religious Accommodation Policy (updated 9/17/2024)
- 804 Visitor Policy (updated 3/25/2025)
- 901 Student Data Privacy Policy (updated 9/17/2024)

Through the renewal process, it has come to our attention that when we migrated our website this winter to a new platform, the most recent version of the policy was not always uploaded to the new website. We regret this oversight and maintain our commitment to updated governance policies. We appreciate Osprey Wilds bringing this to our attention.

It is our hope that the continued focus on policy updates demonstrates the Board's active role in school board governance. Collectively, these efforts demonstrate the Board of Directors' ongoing commitment to making necessary changes to remain compliant with our charter agreement.

The Board views charter compliance with utmost importance. The School Board is committed to continuing to improve our oversight and governance to ensure the longevity of Three Rivers Montessori. Please let us know if any additional documentation is needed to verify that we are compliant with all charter school and MDE requirements.

Looking Ahead: School Board Governance Goals

1. Continued Transparency

Acknowledging challenges, communicating openly, and ensuring board meetings and materials are accessible to the public.

- Publicly posting agendas, meeting materials, and minutes in advance, in compliance with Open Meeting Law.
- Maintaining a user-friendly board webpage with up-to-date governance information.
- Including a statement in meeting minutes that explains the legal justification for any closed sessions.
- Being proactive in acknowledging when past practices were unclear or inconsistent, and clarifying how they've been corrected.
- Updates to the current board agenda to include monthly academic reports for the Executive Director and quarterly reports from school committee members who

can separately review their findings before the board. (see example of updated agenda in appendix B).

- Using objective criteria to evaluate the Executive Director's performance and sharing a paragraph summarizing the performance review and evidence in our meeting notes.

2. Responsiveness

Three Rivers Montessori School will continue to take the authorizer feedback seriously and make timely, concrete changes based on that feedback.

- Implementing corrective action plans submitted to and monitored by the authorizer.
- Holding a special governance workshop to review and update board practices.
- Scheduling a formal board training session in direct response to specific concerns.
- Engaging with outside legal counsel or consultants to audit board compliance.

3. Collaboration with Authorizer

Working in partnership with the authorizer rather than resisting oversight.

- Communicating regularly with the authorizer about corrective steps and progress.
- Inviting the authorizer to observe meetings or board training.
- Adopting policy templates or recommended practices provided by the authorizer.
- Including governance progress in school improvement planning documents.

Three Rivers Montessori keeps our authorizer informed of every step we've taken to strengthen board practices and welcomes their guidance in revising our policies.

4. Legal Compliance and Continuous Improvement

Ensuring the school is not only following the law, but also evolving board practices beyond the bare minimum.

- Conducting annual board self-assessments and reflecting on areas for growth.
- Updating bylaws or board policies to align with evolving best practices.
- Creating onboarding tools for new board members that include open meeting law education.
- Joining local or national charter board networks to learn and improve.
- Participating in MDE's Charter School Board Governance Research Study and Development Project

Three Rivers Montessori has updated the board's onboarding materials and meeting procedures to reflect effective governance.

5. *Respect for Public Trust*

Recognizing that board governance is not just a legal obligation, but a public service responsibility.

- Holding community forums or providing public notices in accessible formats to explain board decisions or answer questions.
- Ensuring board meetings are held at times accessible to families.
- Encouraging public comment and community engagement during meetings.
- Conducting board elections with broad, well-publicized outreach to eligible voters.
- Gathering stakeholder feedback through formal and informal modalities, including surveys, focus groups, public forums, and advisory committees.

Three Rivers Montessori's board exists to serve our school community, and we are committed to earning and maintaining the public's trust through transparency and accountability.

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SECTION 4. Authorizer Contract Requirements

In addition to the concerns raised by Osprey Wilds, the Board would like to demonstrate how Three Rivers Montessori is actively working to meet the terms of the Authorizer Contract.

11 Evaluation Indicators for Academic Performance

Much of the data above was excerpted from the World's Best Workforce Report for 2023-2024 School Year. It is worth noting that, as detailed above, in some instances we believe small sample sizes may reduce the validity of our data. As described in Section 1, we are extremely pleased with academic indicators from our new assessment tool, FastBridge.

1. Mission Related Outcomes

Are all students achieving significant academic and/or personal growth, knowledge and skill development, and accomplishments related to the school's mission?

During Osprey Wilds' recent visit, the feedback summary included clear positive feedback regarding the School's commitment to our mission, saying "There is a clear commitment to the Montessori method at the school, and evidence of efforts to improve the instructional program in alignment with this pedagogical approach."

We are also pleased that Osprey Wilds acknowledged our stakeholders support of the Montessori approach, "Stakeholders can identify the mission of the school. In interviews, parents described support of the Montessori mission and approach taken by the school. Similarly, students spoke positively about their learning experiences and the learning they accomplish in the Montessori environment. Both parents and students felt connected to the school, with parents stating that they could approach the school with any concerns, questions, or suggestions."

The Board has intentionally worked to ensure that all board members embrace the Montessori method. Osprey Wilds also commented from a recent visit "Overall, the school approaches standard in demonstrating fidelity to the mission and vision outlined in the contract. This is based largely on academic performance over the course of the contract period." also saying "Evidence from site visits, interviews, and document reviews indicate that TRM's instructional program and curriculum are aligned to the mission and vision of the school. There is clear commitment to the use of Montessori approaches and practices in order to fulfill the mission and vision outlined in Exhibit D. Additionally, TRM is appropriately staffed to implement an instructional program aligned to its mission and vision. While there is a mix of Montessori training completion among staff, there is a spirit of collaboration and mentorship to help support one another's gaps in specific pedagogical implementation. In interviews throughout the

contract term, staff members identified their desire to learn more about Montessori instruction. The school has made a variety of efforts to support teachers in developing their Montessori skills over the contract term, from having a Director of Teacher and Learning that is Montessori trained, to the current practice of a mentor teacher that provides feedback on Montessori implementation. Though the leadership transitions have impacted what this support has looked like, there has been a consistent recognition that support for Montessori implementation is needed and different solutions to meet this need. There is a clear commitment to the Montessori method at the school, and evidence of efforts to improve the instructional program in alignment with this pedagogical approach.”

2. *English Language Learners*

Are EL students at the school achieving adequate progress towards English Language Proficiency?

The school currently serves a small number of English learners (4% of students; four (4) current students. All four students’ parents/guardians have opted out of testing this year.

In discussions with the school leadership team, the school takes a great deal of care to ensure that our ELL students’ needs are being met. Per school policy, these students receive small group interventions. They also may be offered MTSS as needed for more support (see Section 1 above for more information on MTSS).

The school also adheres to MDE standardized English Learner procedures for identification, entrance, and exit of the program. See Table 10.

Table 10. Minnesota Standardized English Learner (EL) Procedures.



Minnesota Standardized English Learner (EL) Procedures

Identification, Entrance and Exit

Identification	Entrance	Exit
1. Minnesota Language Survey indicates a language other than English AND 2. English Language Proficiency (ELP) Screener with accommodations as appropriate Kindergarten WIDA Screener OR Grades 1 –12 WIDA Screener: Online or Paper	1. Placement in a language instruction educational program (LIEP) AND 2. Continuing Eligibility Annual ACCESS Assessment overall composite score less than 4.5 OR Two of more ACCESS domains less than 3.5	1. Annual ACCESS Assessment Overall composite score of at least 4.5 AND Three or more ACCESS domains of at least 3.5 AND 2. Additional Criteria (if applicable) State approved additional criteria are applied if lowest ACCESS domain is below 3.5
Required student data elements* • Home Primary Language • EL Indicator	Required student data elements* • EL Start Date • EL Indicator = Yes • <i>Ed-Fi Only</i> – Language Service Code	Required student data elements* • EL Start Date is blank • EL Indicator = No

*Via Minnesota Automated Reporting Student System (MARSS) and Ed-Fi Submissions Updated October 2024

3. Reading Growth

Are all subgroups of students meeting expected growth targets in reading?

In aggregate, from FY21 to FY24, the overall percentage of students whose achievement level on the statewide assessments for reading (as measured by North Star Academic Progress) improved on statewide assessments is equal to or greater than the state.

In aggregate, from FY21-FY24, the overall percentage of students whose achievement level decreased or stayed "does not meet standards" on statewide assessments for reading (as measured by North Star Academic Progress) is equal to or less than state.

From FY19-FY24, the combined aggregate percentage of students in grades 1-6 that are “Low Risk” on the spring FastBridge assessment OR from fall to spring move from “High Risk” to “Some Risk” will be at least 55%.

4. Math Growth

Are all subgroups of students meeting expected growth targets in math?

In aggregate, from FY21 to FY24, the overall percentage of students whose achievement level on the statewide assessments for math (as measured by North Star Academic Progress) improved on statewide assessments is equal to or greater than the state.

In aggregate, from FY21-FY24, the overall percentage of students whose achievement level decreased or stayed "does not meet standards" on statewide assessments for math (as measured by North Star Academic Progress) is equal to or less than state.

From FY19-FY24, the combined aggregate percentage of students in grades 1-6 that are “Low Risk” on the spring FastBridge assessment OR from fall to spring move from “High Risk” to “Some Risk” will be at least 55%.

5. Reading Proficiency

Are all subgroups of students achieving proficiency in reading?

From FY19 to FY24, the school’s aggregate proficiency index score for students in grade 3 will be greater than that of the state for the same grade.

From FY19 to FY24, the school’s aggregate proficiency index score for students in grade 3 will be greater than that of the resident district (ISD 728 – Elk River) for the same grade.

From FY19 to FY24, the school’s aggregate proficiency index score for all students (except grade 3) will be greater than that of the state for the same grades.

From FY19 to FY24, the school’s aggregate proficiency index score for all students (except grade 3) will be greater than that of the resident district (ISD 728 – Elk River) for the same grades.

From FY19 to FY24, the school’s aggregate proficiency index score for students in the Free/Reduced Priced Lunch subgroup will be greater than that of the state for the same subgroup and the same grades.

From FY19 to FY24, the school's aggregate proficiency index score for students in the Free/Reduced Priced Lunch subgroup will be greater than that of the resident district (ISD 728 – Elk River) for the same subgroup and the same grades.

From FY19 to FY24, the school's aggregate proficiency index score for students in the Special Education subgroup will be greater than that of the state for the same subgroup and the same grades.

From FY19 to FY24, the school's aggregate proficiency index score for students in the Special Education subgroup will be greater than that of the resident district (ISD 728 – Elk River) for the same subgroup and the same grades.

6. Math Proficiency

Are all and subgroups of students achieving proficiency in math?

From FY19 to FY24, the school's aggregate proficiency index score will be greater than that of the state for the same grades.

From FY19 to FY24, the school's aggregate proficiency index score will be greater than that of the resident district (ISD 728 – Elk River) for the same grades.

From FY19 to FY24, the school's aggregate proficiency index score for students in the Free/Reduced Priced Lunch subgroup will be greater than that of the state for the same subgroup and the same grades.

From FY19 to FY24, the school's aggregate proficiency index score for students in the Free/Reduced Priced Lunch subgroup will be greater than that of the resident district (ISD 728 – Elk River) for the same subgroup and the same grades.

From FY19 to FY24, the school's aggregate proficiency index score for students in the Special Education subgroup will be greater than that of the state for the same subgroup and the same grades.

From FY19 to FY24, the school's aggregate proficiency index score for students in the Special Education subgroup will be greater than that of the resident district (ISD 728 – Elk River) for the same subgroup and the same grades.

7. Science Proficiency (and Growth)

Are all and subgroups of students achieving proficiency in science? And, if applicable, are all subgroups of students meeting expected growth targets in science?

From FY19 to FY24, the school’s aggregate proficiency index score will be greater than that of the state for the same grades.

From FY19 to FY24, the school’s aggregate proficiency index score will be greater than that of the resident district (ISD 728 – Elk River) for the same grades.

8. Proficiency or Growth in Other Curricular Areas or Educational Programs

Are all and subgroups of students achieving proficiency or meeting expected growth targets in other curricular areas or educational programs?

As described in Section 1, The School Board places a large emphasis on the connection between student academic growth and social emotional learning. Throughout the 2024-2025 school year the board has implemented the Nurtured Heart SEL program for all students. We have seen our students learn and grow in their understanding of the importance of treating all with kindness, respect, and understanding. The Nurtured Heart program works in conjunction with the Montessori Pedagogy and enhances the well rounded learning environment that a Montessori classroom provides.

Nurtured Heart is a social-emotional learning (SEL) strategy focused on building strong relationships, promoting positive behaviors, and transforming how adults interact with children—especially those who may be intense or challenging. It’s often used within MTSS frameworks to support behavior and emotional regulation, particularly in Tier 1 and Tier 2 settings.

9. Post Secondary Readiness

Are all subgroups of high school students prepared for post secondary success?

N/A - our school serves K-6 students.

10. Attendance

Are students attending the school at high rates?

The school’s goal was that from FY19 to FY24, the average of the school’s annual attendance rates will be at least 92.0%. Three Rivers Montessori was approaching this expectation, with actual attendance of 91%.

Table 11. Average TRM student attendance rates, 2020-2024.

2020-2024 Attendance	
Consistent Attendance Percentage	91.0%

In 2023-2024 Three Rivers Montessori had an expected attendance percentage school year. Overall the school did not experience any significant attendance issues and showed improved attendance which slightly exceeded the benchmark.

Table 12. Average TRM student attendance rates, 2023-2024 SY.

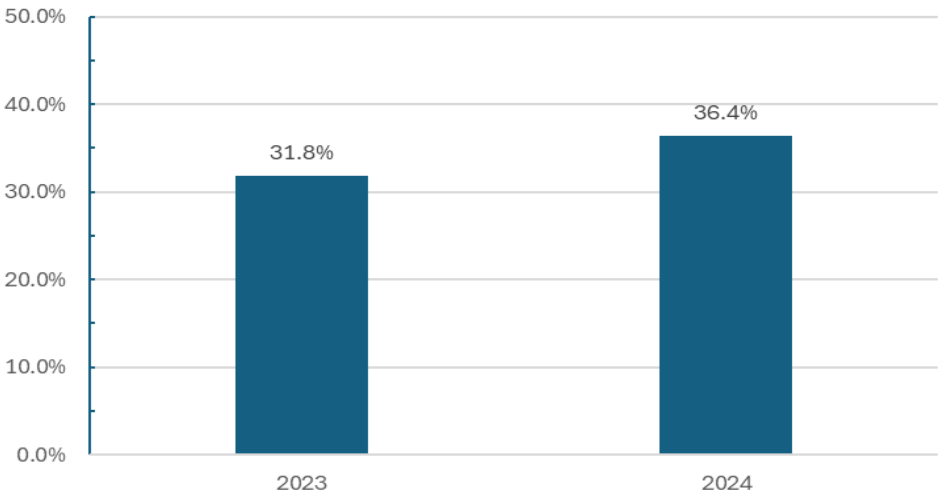
2023-2024 Attendance	
Consistent Attendance Percentage	92.32%

11. Federal and State Accountability

How is the school performing according to federal and state accountability measures?

Overall, the school has seen a decline in MCA test scores over the past three years. However, this decline is largely attributed to the increase in the number of Special Education students served at TRM. When General Education students are considered separately from Special Education students, we see a materials increase in test scores year-over-year from 2023 to 2024.

Figure 2. The number of General Education students meeting standards in math, reading, and science over time. Student proficiency showed a 4.6% improvement year-over-year.



Please see Section 1 above, and World’s Best Workforce 2023-2024 SY report for more information on academic performance and progress.

Measures for Staffing Evaluations

As required by the charter agreement, The Board of Directors evaluates its staffing practices through multiple performance measures. The ongoing implementation of the Staff Development and Support Plan ensures these measures are met through intentional, strategic practices aligned with School Board direction and Osprey Wilds expectations.

1. Ensuring staff members hold appropriate licenses required for their roles:

Three Rivers Montessori verifies and retains records that all staff hold appropriate licensure. Weekly meetings and staff development efforts align with certification requirements and support teachers in maintaining or upgrading credentials.

2. Evaluating staff retention rates and the school's ability to retain high-quality staff:

TRM leadership will continue to model a positive staff culture, recognition, collaboration, and professional growth—all of which contribute to higher retention of high-quality educators.

The Board has partnered with the Executive Director to facilitate staff surveys to objectively evaluate staff engagement and areas of opportunity.

The Nurtured Heart SEL program has been a much needed tool to bring together students and staff. Nurtured Heart not only addresses student social emotional learning but also gives staff the tools to change the way they communicate with their peers.

3. Assessing staff satisfaction with their employment at the school:

The Board will continue partnering with the Executive Director to gather feedback through surveys and regular check-ins to assess staff satisfaction and inform school improvement planning.

In an all staff survey given in December we asked:

What do you enjoy about working at TRM?

- The friendly atmosphere.
- There is a good collaborative community within the building that encourages bouncing ideas off of each other.
- The children and my co-workers.
- The people are amazing... Our new director has done an amazing job in her new role and cares about staff.
- Paula is available and always approachable. Staff is supportive.
- Watching students master new concepts, especially younger students learning to read.

- It is a place committed to kids and learning. It is also staff-friendly, supportive, and positive. There is great progress this year. I'm excited for the future.
- Working with the students; I love the Montessori philosophy.
- Montessori Environment.
- I love my co-workers and the support from Paula and Sarah. I feel that my voice is heard and supported in my position and in making decisions.
- The wonderful families that we serve.
- I enjoy the staff and the children.

4. Providing effective professional development opportunities for staff:

Weekly PLCs, targeted training aligned with student data, and Board-directed investments will ensure that staff continue to receive meaningful, standards-aligned professional development.

During the 2024-2025 school year our teaching staff and Executive Director participated in Careiall Training to support learning in conjunction with the Read Act that was passed and signed into law by Governor Tim Walz on May 24, 2023.

Special Education staff participate in annual and ongoing training provided through our partner, Designs for Learning, to ensure they remain current with evolving best practices, legal requirements, and instructional strategies in the dynamic field of Special Education.

The Board's plan for staff development is detailed further in Appendix D.

5. Reviewing employment practices, including hiring, training, and performance evaluations:

The Board of Directors ensures that school leadership continually structures onboarding, consistent evaluation processes, and professional growth systems tied directly to instructional goals and board expectations. When making decisions concerning staffing the Board of Directors has directed school leadership to ensure all potential candidates and returning employees align with the schools mission statement and goals.

The Board has also approved a Staff Development Plan. See Appendix D.

Measures for Board Governance

The Authorizer contract establishes the following as requirements:

1. *Evaluating board composition to ensure statutory requirements and a mix of skills, experience, and representation.*

The Board of Directors consists of a team of very dedicated volunteers with a mix of skills, experience, and representation. Our professional backgrounds are described briefly below, and are also posted on our website.

**Jenny Hepokoski
Board Chair
Parent Member**

Jenny holds a Master's degree in Speech Language Pathology and has worked as a Speech Language Pathologist in both a medical and educational setting, including 4 ½ years in a public elementary school. Currently, Jenny works as an Augmentative Alternative Communication (AAC) Consultant for a private speech generating device company.

Jenny resides in Otsego with her husband and three children, two of whom currently attend Three Rivers Montessori. She has a passion for working with children, particularly in the area of reading and literacy, and she believes strongly in having an active role in our children's education. She strongly believes in Three Rivers Montessori's mission and is committed to the success of our students and school.

**Brooke Blomker
Board Secretary
Community Member**

Brooke holds a Master's degree in Developmental Psychology and has worked in Early Childhood Education for the last 10 years, working as a teacher, School Leader, and most recently in Human Resources. Currently Brooke works as a HR Project Manager / Learning Specialist at a nationwide education company with operations in 14 states, including many Montessori Schools.

Brooke resides in Elk River with her husband and two children. She is excited to leverage her knowledge and experience to continue working toward TRM's mission and vision.

**Tim Eilrich
Board Treasurer
Community Member**

Timothy is a business professional working in the Food and Dairy industry since 2004. He manages a technical sales team based out of Champlin, MN who is responsible for providing goods and services across North and South America.

Timothy and his wife have been raising their 4 children in Elk River since 2014. He and his wife have home schooled for 2 years prior to getting into TRM. This Fall he will have 3 children attending TRM.

He's a bowler, throwing in leagues at McPetes and Andover Lanes. He also enjoys being outdoors; gardening, fishing, camping, hunting and playing sports with his children.

Tim agrees with a local approach to schooling and recognizes the importance of being involved in our children's education. He believes in TRM's Montessori mission and looks forward to being a part of it.

Dr. Jan Creed
Teacher Member

Jan has been a teacher at Three Rivers Montessori for three years. Prior to working at TRM, Jan owned and was the school Principal and a teacher at Heritage Montessori School in Big Lake, MN, which had preschool through grade 5. Jan owned and operated Heritage from 2005 to 2022 when it closed.

Jan has both her Minnesota Elementary License and Children's House Montessori Certification. Jan has a passion for education and has worked in education nearly all of her adult life teaching in all grade levels from preschool to grade 6. She also worked in Title 1 at Lincoln Elementary. Additionally, Jan has her Masters Degree, Principal Licensure through St. Cloud State, and her doctorate through St. Mary's University.

Jan has been married for over 50 years and raised 4 children to adulthood and has one child still at home. She joined the school board in 2024 with the desire to ensure TRM maintains the Montessori philosophy and pedagogy.

Nikki Patterson
Teacher Board Member

Nikki has been with Three Rivers for the last 3 years. She started as a paraprofessional and has worked her way through school to become one of our new E1 teachers.

Nikki is currently enrolled in a Montessori Master's program and is looking forward to applying her knowledge to the classroom and her student at TRM.

She hopes to continue to develop a diverse pathway to Montessori training that fits each teacher's need, and the school's need for highly qualified Montessorians as well.

Patrick Locken
Parent Member

Patrick is currently an engineer (AutoCAD) at a commercial woodworking/fixture company in Fridley. With an Associate's Degree from Hennepin Technical College, along with several CNC certifications. He started at the company 14 years ago in the shop as a machine operator and slowly worked his way into his current role.

Patrick and his wife built a home in Elk River 10 years ago. Now with 2 children, 1 of which attends TRM.

Patrick wanted to join the Board of Directors to share his perspective as a parent from a blue-collar background. As a board member, Patrick's perspective is that the board should ensure TRM students are receiving a non biased education rooted in facts and truth. He is passionate about providing all students an education that will help them excel, no matter what path or profession they ultimately pursue.

Lydia Skadberg
Teacher Board Member

Lydia is one of our dedicated licensed teachers here at TRM. Lydia is a mom of four TRM students and a fierce advocate for the Montessori environment. Her family started at the school at its inception. As a teacher who left traditional public education after seeing some of the brokenness in traditional education, she saw beauty in the Montessori environment at TRM. She has been a substitute teacher here at TRM since 2021, returned as a part-time teacher in 2023, and made the transition to a full time lead teacher in 2024. She also enrolled in a full-time masters program for Montessori Education at UW-RF in 2024.

Lydia joined the school board in 2023. She aims to protect and promote the integrity of the Montessori model within the charter setting, bridge the gap between policy and practice, and continue to inform Board decisions with real classroom realities.

2. *Assessing board training and development activities to meet statutory requirements and enhance effectiveness.*

The Board Secretary maintains a board training compliance document to ensure all Board Members are in compliance with board-required training.

Board's meeting agendas include authorizer feedback, and any board members who have completed training that month are asked to share training takeaways with other board members.

The Board also is scheduling additional training for all board members this summer.

3. *Reviewing board satisfaction with their service.*

The Board recognizes that reviewing board member satisfaction is key to maintaining an effective, collaborative, and forward-looking school board.

Our annual strategic planning sessions have included conversations around the topics of satisfaction and engagement as board members.

For any board members who have resigned and/or decided not to run again, the Board Chair or Board Secretary has been checking in with them for an informal exit interview to gather feedback.

4. *Ensuring the board is compliant with statutory requirements and ACNW expectations.*

The Board of Directors has remained compliant with statutory requirements and authorizer expectations as of today. Any corrective action needed has been acted upon immediately by the Board.

5. *Assessing the board's decision-making, oversight, and ability to hold school leadership accountable for performance goals and compliance.*

As described in-depth in Section 3, the board has completed a great deal of reflection on our successes and opportunities for improvement since the school was founded.

The school board regularly evaluates its governance practices to ensure effective decision-making, appropriate oversight, and strong accountability systems for school leadership. This includes:

a. *Board self-evaluations during annual strategic planning session*

The board conducts annual self-assessments that examine how decisions are made, the clarity of roles between the board and administration, and whether board actions align with district goals and student outcomes.

b. *Performance goal monitoring*

The board routinely reviews progress toward established school performance goals. These updates are presented by school leadership by the Executive Director and smaller committees, and are discussed in open meetings.

c. *Accountability for the Executive Director*

The board uses a formal evaluation process for the Executive Director, tied directly to the district's strategic priorities, student achievement, financial management, governance, and compliance with statutory requirements and authorizer agreement.

d. *Policy and Compliance Oversight*

The board ensures that district policies are up-to-date and that leadership is implementing them effectively. Audit reports, legal reviews, and compliance

reports are regularly reviewed to uphold transparency and accountability.

e. *Public and Transparent Deliberation*

Decision-making processes are conducted openly in public meetings, allowing for informed discussion, stakeholder input, and documented rationale behind major decisions.

f. *Use of Committees and Work Sessions*

Finance committee supports in-depth review of key areas such as budget alignment, strategic goals, academic performance, and compliance—allowing for thoughtful and thorough board oversight.

At the direction of the Board, the Executive Director has continued partnering with the Parent Committee. The Board receives a report at our monthly meetings on parent committee initiatives and feedback.

Various stakeholders are regularly invited to join board meetings and provide a report. As detailed in our meeting minutes, past stakeholders have included Special Education Director, Pathfinders Coordinator, Parent Committee Chair.

The Board also schedules work sessions annually in July to prepare for the coming school year, and on an as-needed basis throughout the year.

SECTION 5. Summary and Conclusions

Board Reflections

The Board of Directors reviewed and updated the “Board Reflection Policy” March 25, 2025 to ensure a high-functioning, reflective board that is focused on student outcomes while fulfilling its state mandated fiduciary responsibilities and living the board designated core values of integrity, Stewardship, Compassion, and Montessori Focus.

We have put several processes in place for the school board to reflectively review:

- The School Board utilizes the “School Board Binder” for reflection at every meeting (See Appendix E).
- Directing the executive director to have a school leadership team to report to the board.
- Directing school to show evidence of results, not just reporting activities.
- Team approach to make sure of transition consistency.

As Three Rivers Montessori prepares for charter renewal, the School Board will continue to carefully review the following:

- The Board will review monthly financial statements during both Finance Committee and School Board meetings. All potential expenditures will be meticulously examined, adhering to policies that have been approved and are regularly updated by the School Board to ensure fiscal responsibility and sustainability.
- The Executive Director will provide updates on progress toward academic goals, enrollment, and other relevant operational information at each School Board meeting, as directed by the Board (see Appendix E). School committees, including academic and finance committees, will be available to address any questions regarding the information presented by the Executive Director. This approach ensures complete transparency and strengthens the Board's commitment to sound academic and financial governance as part of the renewal process.

The School Board is dedicated to making well-informed, fact-based decisions regarding future goals and initiatives. Charter compliance will remain a critical focus. Under the leadership of the Board Chair, the Board will continue to address and rectify past challenges to ensure that Three Rivers Montessori is positioned for long-term success and alignment with the renewal criteria.

Family and Community Engagement

In alignment with the goals for charter renewal and the continued direction of the School Board, the school will continue to foster and strengthen family and community engagement, with a dedicated focus on Montessori principles that guide both student learning and community involvement. These initiatives will ensure that the school’s educational approach remains robust,

responsive, and deeply connected to the community. The following actions have been implemented under the ongoing direction of the School Board:

- **Parent Committees:** The School Board, in partnership with the Executive Director, will continue to facilitate the Parent Committees that were established during the 2024/2025 school year. These committees are vital for maintaining strong communication between families and the school, in line with the school’s commitment to the Montessori philosophy of collaboration and community-building. We have already seen strong support from our Parents they have become a vital part of our school community- from helping with planning all school events like Field Day and Fundraising events. School leadership meets with school families on a monthly basis at our Parent Meeting. Topics of discussion vary from curriculum measures, school testing, enrollment goals, and community engagement.
- **Surveys for Family Feedback:** School leadership will continue to distribute surveys to families throughout the school year to gather feedback on programming, educational experiences, and the schools commitment to safety. This feedback loop will ensure that the Montessori approach remains adaptable to the evolving needs of students and families, further supporting the charter renewal process.

Figure 7. Parent responses on the 2024-2025 parent survey.

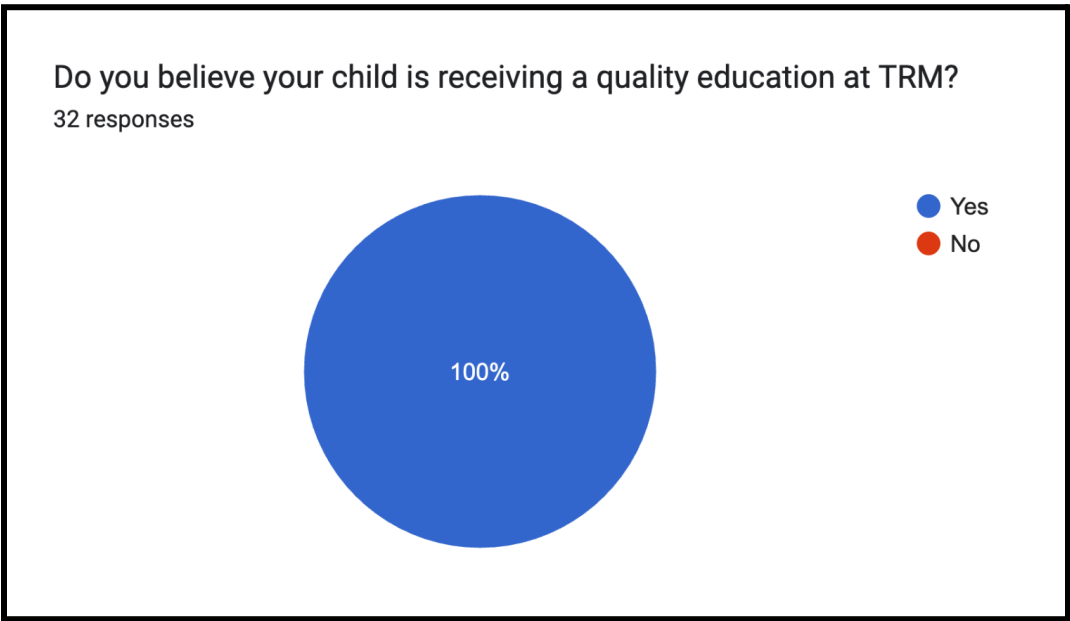
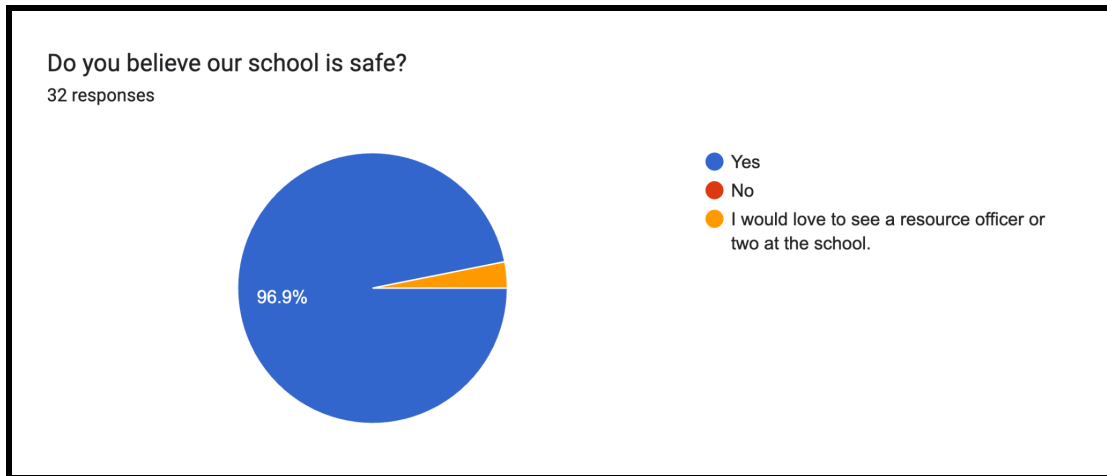


Figure 8. Parent responses on the 2024-2025 parent survey.



- **Community Engagement through Environmental Learning:** Teachers will explore new ways to engage students in community activities, particularly those that emphasize Environmental learning. By integrating Montessori principles such as hands-on experiences and real-world connections, the school aims to cultivate a deeper understanding of environmental stewardship and community involvement in students, enhancing both their academic growth and social responsibility. Our students have enjoyed field trips to local farms and museums throughout recent school years. Our students are able to engage in learning outside of the classroom environment which helps strengthen and connect the lessons taught in the classroom to the community.
- **Expanding Community Involvement:** The School Board will continue to seek opportunities for the school to participate in local events and programs that align with Montessori values, promoting experiential learning and community connection. These efforts will enhance the school's presence in the community, foster greater enrollment, and further solidify the school's role in advancing Montessori education in the broader community. Actions encouraged by the Board of Education:
 - For the 2025-2026 school year, the board of directors has encouraged the school to apply for the Como Park experiential learning grant, which is in progress now.
 - Universal Design, Backward Design, or PLTW lessons for students have been encouraged by the school board to increase student motivation for learning, connecting to the world around them.
 - Reaching out to Minnesota Montessori Schools for greater clarity in strengthening Montessori partnerships, philosophy, systems approaches, and practices.

The families we serve are our biggest supporters. We wanted to share some testimonials from current families:



"We have been at Three Rivers Montessori for two years now, with two of our children at the school. TRM is a great resource for those in our community looking for another option outside of traditional school while still being a free public charter school. Children get to learn in a hands-on way, with the most beautiful materials that really help keep them engaged. It is a child led learning experience, with educators that are fully invested in making sure every kid is where they need to be academically."

"One thing we love is that our son has been with the same teacher for two years so far. She has been on top of his personal progress in a way that wouldn't have been able to be followed in the same way if he had switched teachers every year. As a former homeschooling family we wanted to find an option that felt safe, celebrated our children for who they were, and had great opportunities for social interaction. We have found everything we were looking for and more at Three Rivers Montessori. We have seen our children grow so much, and look forward to continuing to see how the school can positively influence more families' lives."



"After an educator friend of mine had visited with our grandson who was going into first grade, she suggested that we look into a Montessori school because she thought it would be a good fit for him. We are so thankful for her advice because he is now in second grade and loves going to school every day. He has a great attitude about getting up early and doesn't want to miss a day. What are the reasons for this?"

First, Three Rivers is a warm, welcoming school where the staff knows the children's names and greets them warmly. The office people are cheerful and helpful. The assistants at the morning drop-off are equally warm to each child.

Secondly, the learning environment is one which is non-threatening, yet encourages each child to work hard at the level they are at. We especially appreciate that because since our grandson finds spelling very easy, he is not using the same list as the other children, but has a more difficult one at his level. The same holds true in other subjects.

Independence and self-motivation is at the core of Montessori classrooms which trains the students for a lifetime of success. Working together with other students is an important skill that benefits them now as well as in the future. Kindness and caring for others is valued.

Teachers probably play the most vital role in a child's learning and our grandson has the best! She is hardworking, patient, and it is obvious that she cares for each student. We have appreciated her openness and availability."



The Board of Directors is proud of the student-centered education that is being delivered at Three Rivers Montessori. We believe the strongest evidence of this comes from our parent surveys, where 100% of our parents agreed with the statement “My child is receiving a quality education at TRM” when administered in Fall of 2024 (see Figure 7 above).

“The TRM Board of Directors has failed in its obligations to monitor the School’s academic performance and take appropriate action to ensure the school’s success based on its review of school performance. Further, the Board did not respond to the School’s declining enrollment and financial challenges, evaluating the school leader under MN Stat. §124E.12 Subd. 2(a), and comply with contractual and legal requirements, including policies. This represents a breach of the Board’s fiduciary duties and demonstrates inadequate board capacity to govern.

“Osprey Wilds takes seriously its responsibility to students, communities, and taxpayers to ensure the schools it authorizes offer children a high-quality education. Three Rivers Montessori has materially failed to fulfill the terms of the charter contract such that the ongoing viability of the School is threatened. Due to academic performance, insufficient enrollment, repeat findings in external financial audits, non-compliance with charter contract and legal requirements, and the Board of Directors’ failure to fulfill its fiduciary obligations, the School does not have a clear future path toward viability. Every child deserves the opportunity for a great education, and the students at Three Rivers Montessori deserve nothing less.”

This renewal process has allowed the Board to reflect on Three Rivers Montessori’s history and directly address areas of weakness. As a small school launching at the heart of the pandemic, Three Rivers Montessori has faced challenges but has learned and grown from each, emerging with a renewed understanding of best practices and a clearer path forward.

Since the school’s inception, the Board has continually worked to build strong partnerships with school leadership and all stakeholders, including educators, families, and the community. As detailed above, Three Rivers Montessori’s Board has taken a proactive approach. We have worked to ensure the school’s success in regards to the concerns raised about academic

performance, enrollment and financial performance, compliance, and governance. The school is making significant academic progress, has taken measures to reduce spending and increase enrollment, and has put controls in place to ensure compliance with all charter school requirements.

The Board wholeheartedly agrees that every child deserves the opportunity for a great education. We believe this sentiment has been shared by Osprey Wilds on a recent site visit, saying, “By SY 2024-2025, student feedback collected during renewal interviews continued to highlight a positive experience. Students enjoyed celebrations, academic challenges tailored to their abilities, and the supportive environment created by their teachers.”

We look forward to continued partnership with Osprey Wilds in providing our students individualized, high-quality Montessori education.

The Three Rivers Montessori Board of Directors believes the school has met all requirements for reauthorization and respectfully requests that Osprey Wilds renew the school's charter contract.

SECTION 6. Appendices

Appendix A. MCA Scores; schools authorized by Osprey Wilds.

Rank	School	Math 2024	Reading 2024	Science 2024	Avg
1	North Shore Community School	57.3%	65.1%	49.1%	57.2%
2	Laura Jeffrey Academy Charter	43.0%	72.0%	46.5%	53.8%
3	Great Expectations	40.2%	58.3	62.5%	53.7%
4	Swan River Montessori Charter School	50.6%	63.6%	45.5%	53.2%
5	Glacial Hills Elementary	32.7%	46.9%	75.0%	51.5%
6	Crosslake Community Charter School	33.7%	51.8%	55.0%	46.8%
7	La Crescent Montessori & Stem Academy	30.6%	52.8%	N/A	41.7%
8	North Lakes Academy	33.1%	44.8%	42.8%	40.2%
9	World Learner Charter School	32.6%	45.3%	41.9%	39.9%
10	New Discoveries Montessori Academy	30.1%	49.1%	36.0%	38.4%
11	Metro Schools Charter	37.6%	50.6%	21.9%	36.7%
12	Discovery Woods	15.2%	50.0%	40.0%	35.1%
13	Higher Ground Academy	29.2%	44.7%	29.9%	34.6%
14	Riverway Learning Community Charter	21.2%	38.5%	41.2%	33.6%
15	Noble Academy	34.9%	30.4%	24.8%	30.0%
16	Osprey Wilds Environmental Learning Center	24.3%	35.6%	25.0%	30.0%
17	Cannon River STEM School	20.9%	33.3%	29.3%	27.8%
18	Three Rivers Montessori School	17.8%	26.7%	38.5%	27.7%
19	AFSA Elementary	25.3%	30.2%	23.8%	26.4%
20	AFSA High School	25.3%	30.2%	23.8%	26.4%
21	Aurora Waasakone Community of Learners	12.0%	25.8%	37.5%	25.1%
22	Vermillion Country School	6.3%	28.6%	35.0%	23.3%
23	Prairie Seeds Academy	20.0%	21.2%	17.1%	19.4%
24	East Range Academy of Technology and	0.0%	39.3%	16.0%	18.4%

	Science				
25	Aurora Charter School	20.7%	9.8%	N/A	15.2%
26	Partnership Academy, Inc.	14.0%	17.4%	11.8%	14.4%
27	Excell Academy Charter	7.5%	22.6%	5.4%	11.8%
28	Academic Arts High School	7.7%	15.4%	N/A	11.6%
29	Technical Academies of Minnesota	2.2%	20.5%	8.3%	10.3%
30	Voyageurs Expeditionary	9.1%	12.7%	4.0%	8.6%
31	Central Lakes Adventure School	0.0%	10.0%	13.3%	7.8%
32	Northern Lights Community School	0.0%	18.2%	0.0%	6.1%
33	Discovery Public School of Faribault	0.0%	8.0%	9.1%	5.7%
34	Oshki Ogimaag Charter School	N/A	N/A	N/A	N/A

Appendix B. 2024-2025 Reading Corps program implementation data.



Three Rivers Montessori

Reading Corps Implementation Data YTD

1	1	1	1	16
Total Sites	Total Districts	Total Tutors	Tutors with Minutes	Students with Minutes
16.0	596	11.9K	84.4%	93.8%
Avg. Stds Tutored p/Tutor	Total Sessions	Total Minutes	Avg. % Tutoring	Avg. % Fidelity
70.0	13	92.9%	100.0%	
Avg. Minutes p/Week	Students above Target Growth	% Students above Target Growth	% Tutors with Min. Caseload Met	

Member Service Hours & Values as of 3/21/2025

Tutor(s)	Hours Served	Value of Hours
Kristi	451.75	\$16,403.04

% Students Exceeding Target Growth



Grade: Assessment	Number of Students	Progress Exceeding Target Weekly Growth	% Exceeding Target Growth	Progress Not Exceeding Target Weekly Growth	% Not Exceeding Target Growth
Grade K: LS	1	1	100.0%	0	0.0%
Grade 1: NW	5	5	100.0%	0	0.0%
Grade 1: CBM-R	1	1	100.0%	0	0.0%
Grade 2: CBM-R	5	5	100.0%	0	0.0%
Grade 3: CBM-R	3	2	66.7%	1	33.3%
Total	14	13	92.9%	1	7.1%

Appendix C. Raccoons Read initiative to get families reading, parent communication.



Reading with your child for just 20 minutes each evening can open up a world of adventure and learning. From far-off lands to solving mysteries, reading not only builds essential skills but also strengthens family bonds. Here's how you can make reading a joyful and regular part of your family's routine.

Why 20 Minutes?

Setting aside 20 minutes for reading is a manageable and impactful time commitment that can significantly benefit your child's development. It boosts imagination, enhances language skills, and creates cherished moments together.

How to Get Started

1. **Read Together Daily:** Choose a book, find a cozy spot, and dive into a story. Whether you read to them, they read to you, or you read together, the goal is to make reading enjoyable.
2. **Log Your Adventures:** Use your "Reading Log" to track your reading journey. It's a fun way to celebrate the stories you've explored and reflect on favorite moments.

Tips for a Great Reading Routine

- **Create a Special Reading Space:** Transform a corner of your home into a reading nook or build a blanket fort to make reading time magical.
- **Mix It Up:** Explore a variety of books, from comics and cookbooks to audiobooks and e-books, to keep things exciting.
- **Get Creative:** Use funny voices, make predictions, or act out scenes to enhance the reading experience.

More Tips for Parents

- **Be a Reading Role Model:** Let your child see you reading and share your experiences to show that reading is valuable and enjoyable.
- **Choose Books Together:** Encourage your child to pick books that interest them, fostering excitement and engagement.
- **Ask Open-Ended Questions:** Engage in discussions about the stories to improve comprehension and critical thinking.
- **Connect Reading to Real Life:** Relate stories to real-world experiences to reinforce the relevance of reading.
- **Celebrate Progress:** Praise efforts and progress, building confidence and motivation.

By implementing these strategies, you can create a supportive environment that fosters a lifelong love for reading. Start your family's reading adventure tonight and join a community of readers ready to explore new ideas and worlds.

Ready, Set, Read!

Appendix D. TRM Staff Professional Development Plan 2025-2026 SY.

Three Rivers Montessori Professional Development Plan 2025-2026

Empowering Students to Reach Their Full Potential Through Montessori Learning

The best way to plan staff development is to assess your goals and needs first, then find professional development that supports them. It's also critical that you assess student data as part of the planning process to ensure needs are met. Professional development should be research-based. Effective professional development is based on solid research.

Professional Development Plan for Montessori Education (Teachers)

The teacher will seek pre approval in advance of the class/program offering and report progress to TRM Administration on:

1. University programs and credits
2. Clock hours for workshops – 125 clock hours equals 3 credits
3. Document videos, readings – Limit of 3 credits or 125 clock hours per year

A time off request needs approval at least 30 days in advance if needed.

The school will provide for teachers:

1. Five days during the school year to attend Montessori PD to include:
 - a. Classes/Workshops
 - b. Observations at other Montessori Schools
2. New teacher mentorship
3. Possible financial support for workshops, determined yearly based on budget Forecast

All Professional Development will be documented in teacher's personnel file with signatures of teachers and administration.

Professional Learning Communities

1. Licensed teachers will engage weekly in PLCs focused on lesson study, integrating State Standards, and research based instructional strategies which promote student engagement and achievement.

The school will provide instruction on these topics school-wide:

1. MTSS and PBIS
2. Positive Classroom Management
3. Special Education expectations and services
4. New Teacher/EA/Paraprofessional mentorship
5. Mandatory trainings/Topics of need incorporated monthly/bi-weekly

Appendix E. Board of Directors Sample agenda.

THREE RIVERS MONTESSORI CHARTER SCHOOL

Regular Board Meeting Agenda

Tuesday, March 25th, 2025 at 6:00 p.m.

Meeting held at Three Rivers Montessori: 17267 Yale St NW, Elk River MN 55330;

Sent to OW - [date] | Placed on Website – [date]

Approved on: [date]

I. CALL MEETING TO ORDER

- A. Pledge of Allegiance
- B. Roll Call and Declaration of Conflict of Interest
 - a. Board Members Present + Declarations:
 - b. Board Members Absent:
 - c. Other Attendees:
- C. Review of TRM Mission and Vision Statements

Mission: Empowering students to reach their full potential through Montessori learning.

Vision: Academic Excellence * Community Engagement * Environmental Stewardship

- D. APPROVAL OF MEETING AGENDA

II. PUBLIC COMMENTS

The School Board welcomes input from community members. Those who are interested in addressing the School Board at a future meeting can contact the Executive Director. This formal process is intended for items requiring greater scrutiny and discussion from board members. Advance notice is required to allow for administrative staff to gather necessary supporting documents and information and to allow for adequate notice to board members and the general public of items that will be brought before the board for discussion.

III. GENERAL REPORTS

- A. Finance Report
 - a. Monthly Financials - Mindy Wachter
 - i. Report attached
- B. Executive Director Report
 - a. Monthly Report Attached
 - i. Executive Director Goals/Update
 - ii. Enrollment and Lottery - Sarah Roell
 - iii. Fundraising - Chris Castagneri
 - iv. Environmental Update - Lydia Skadberg
- C. Academic Achievement Report

IV. BOARD MEMBER TRAINING & SELF-REFLECTION

- A. Recently completed trainings
 - a. [training name] completed by [board member name]
 - b. Training takeaways:
- B. Upcoming opportunities for board training

V. GOVERNANCE

- C. Policies: The School Board will be asked to review as a first reading the following policies as part of the annual review cycle.
 - a. [policy name] - **First Reading**
 - b. [policy name] - **Second Reading**
- D. Policies: The School board will be asked to approve these policies:
 - a. [policy name]

VI. Action Items

- A. Approve TRM Regular Board Meeting Minutes [date]
- B. Approve Prior Month Financial Report (included)
- C. Approve 2024-2025 Revised Working Budget
- D. Approve Prior Month Expenditures
- E. Approve New Hire to replace another position - [job title]
- F. Approval of donations

VII. INFORMATION

- A. Upcoming Dates of Importance:
 - a. [date] - event
 - b. [date] - event

VIII. REVIEW OF NEXT MEETING DATE

1. Date, Time, Location of Next Regular Board Meeting - Tuesday, [date] at **6:00 p.m.**
Location: At Three Rivers Montessori
2. Agenda Items Request or Send to Board Chair, Jenny Hepokoski

IX. ADJOURNMENT

Meeting ended at:

Appendix C. Executive Director Performance Review Self-Assessment, for 2024-2025 SY.

Three Rivers Montessori School

Executive Director Performance Evaluation for SY 2024-2025

- A. Governance
 - i. Standard 1.b - Goals and/or Strategic Plan
- B. School Finances
 - i. Standard 2.a - Budget Development and Maintenance
 - ii. Standard 2.b - Financial Statements
- C. Communication and Community Relationships
 - i. Standard 3.a - Relationships with the Community
 - ii. Standard 3.b - Engagement
 - iii. Standard 3.f - Visibility & Approachability
- D. Teaching & Learning
 - i. Standard 6.a - Staff Development
 - ii. Standard 6.b - School Improvement

PERFORMANCE GOALS AND STANDARDS	
A. Governance Standard 1.b - Goals and/or Strategic Plan b. Maintain a school district budget and financial position that provides short-term and long-term stability. Provide leadership to maximize use of school district resources Ongoing 2024-2025 Evidence: 1. Balance Budget Development 2. Communication weekly 3. Reviewing Expenses weekly and monthly 4. Multi-year projections in place 5. Trend Data analyzed and documented 6. Finance/Leadership Team meetings with documentation of the minutes as we review budgets 7. Fund-raising activities planned 8. Developed "what if" strategies	Objective 1.: - By January 30th and June 30th 2025, the Executive Director will develop and implement a three to five-year budget projection plan that considers enrollment, anticipated state and federal funding, expected expenditures, salaries and benefits, reduces the deficit, a review of all staffing positions, and grows the fund reserve. Possible Sources of Evidence: - Plan available for review - Budget development and oversight procedures in place - School board updates/communiques - Minutes of Leadership Team meetings - Business Manager is consulted regularly Objective 2.: - Communicate employee proposals to the school board, recommend adjustments to employee policies and salary structures as appropriate, and manage all employee contracts and policies; - Develop and maintain a comprehensive strategic planning process, which includes short- and long-term planning and development of school district and instructional goals Possible Sources of Evidence: - School Board Agenda and Minutes - Strategic Plan - WBWF – completed with updates - Osprey Wilds Recertification - completed

B. School Finances Standard 2.a - Budget Development and Maintenance Standard 2.b - Financial Statements a. Engages in timely budget planning and actions that consider current and long-range information and data; seeks balance to meet students' current and future needs and be fiscally responsible to community; distributes resources to meet immediate and long-range objectives b. Provides constant flow of budgetary and/or financial information and discussion of ramifications of changes	Objective 1: By 6-20-25, develop and present a school district budget for 2025-2026 school year that aligns with the school district's five- year financial plan, reduces the deficit, and includes recommendations for school board action. Possible Sources of Evidence: - Plan available for review in process - Plan presented on time - Budget development and oversight procedures in place - School board updates/communiques – variety of information for school board decision making 2025-2026 School Visioning/Preschool - School board monthly review of year to date budget expenditures, comparison to previous year expenditures/revenues, and encumbrance - Year-at-a-glance calendar key budget development-related dates - Minutes of Leadership Team meetings
C. Communication and Community Relationships Standard 3.a - Relationships with the Community Standard 3.b - Engagement Standard 3.f - Visibility & Approachability a. Builds and sustains productive relationships with public and private sectors, such as local law enforcement, MSBA, MASA, etc. b. Seeks out and provides opportunities for input from external groups and individuals; uses the input in decision-making process	Objective 1: Throughout 2024-2025 the E.D. will build relationships and engage with the community; Inform the Community as a Whole; Provide Advocacy and be Visible and Approachable. Possible Sources of Evidence: - Attendance at events to promote TRM - Title I Family Involvement Plan 2024-2025 updated The school utilizes a bi-monthly newsletter and each classroom communicates daily or weekly as well. TRM holds family engagement events to connect families to the school environment. In addition, we have engaged parents and students in a Reading at Home Program. - August 2024- Summer Greet and Meet with free book give away and games at a local park - October 2024 - Read at Home Program Kick off - January 2025 - Parent Meeting sharing Title I information and school improvement meeting

c. Engages in timely budget planning and actions that consider current and long-range information and data; seeks balance to meet students' current and future needs and be fiscally responsible to community; distributes resources to meet immediate and long-range objectives	• Spring 2025 - Parent Meeting • End of Year 2025 Family Picnic with free book giveaways and games • Community engagement meetings • TRM family involvement • Reach out to involve community • Website, Facebook etc. • Surveys		
D. Teaching & Learning Standard 6.a - Staff Development Standard 6.b - School Improvement	Objective 1: Throughout 2024-2025 School Improvement in reading and a safe and caring culture will be the focus of improvement. Possible Sources of Evidence: • Staff Development Plan and Meeting Dates (PLCs) - Monthly • School Improvement (Reading – MCAs and FastBridge data;) • Curriculum and Instruction (Implementing Readers' Workshop) • Professional Knowledge of Teaching and Learning (Coaching and mentoring) • Culture of Cooperation (Safe and Caring Classrooms and School Wide expectations) • Media Center Schedule in place for interventions and extensions • ReadingCorp in place – Small group interventions • Title I interventions in place • Word of the month with classroom lessons in compassion and affirmations • Classroom observations with feedback loop • MTSS in place – Data Days • Positive Discipline in the Montessori Classroom		
Standard 1. Governance Team: Element 1.b. Goals and/or Strategic Plan			
Highly Effective (4) <i>Facilitates development of the school district's short- and long-term measurable goals and aligns available resources with school district's budget to accomplish goals.</i>	Effective (3) <i>Facilitates development of the school district's short- and long-term goals and recommends necessary financial strategies to meet</i>	Developing (2) <i>have been developed but no overall plan or alignment of resources exists</i>	Ineffective (1) <i>Goals are not developed</i>

	goals		
Standard 2. School District Finances: Element 2.a. Budget Development and Maintenance			
Highly Effective (4)	Effective (3)	Developing (2)	Ineffective (1)
Engages in timeline budget planning and actions that consider current and long-range information and data; seeks balance to meet students' current and future needs and be fiscally responsible to community; distributes resources to meet immediate and long-range objectives	Engages in proactive budget actions that consider current information and data; seeks balance to meet the students' needs and be fiscally responsible to community; distributes resources in light of school district goals and immediate objectives	Budget development, resource allocations, and management is focused on meeting immediate needs and fiscal issues. Decisions are primarily reactive to current needs of the school district.	Budget knowledge is limited. Budget is developed and managed without taking into consideration current needs of the school district. Resources are allocated without consideration of school district needs.
Standard 3. Communication and Community Relationships: Element 3.f. Visibility and Approachability			
Highly Effective (4)	Effective (3)	Developing (2)	Ineffective (1)
Is visible and approachable by members of the community and varied events	Is visible and approachable by community; attends some events	Attends few events and is seldom approachable by community	Is neither visible nor approachable by community
Standard 6. Teaching and Learning: Element 6.e. Culture of Cooperation			
Highly Effective (4)	Effective (3)	Developing (2)	Ineffective (1)
Develops and supports open, productive caring and trusting relationships among staff	Encourages open, productive, caring and trusting environment among staff	Haphazardly supports open, productive, caring and trusting environment among staff	Culture of trust does not exist

Evaluation Period: _____ to _____

Superintendent's Signature: _____ Date: _____

School Board Chair's Signature: _____ Date: _____

Other Evidence:
Monthly School Board Updates
February 18, 2025

- Executive Director Goals Update**
- Budgeting for 2025-2026

- Numbers of students and staff
 - Savings – Custodial services etc.
- Family Engagement – January and monthly through the end of the year
 - Breakout groups: Curriculum, Space, Fundraising
- Professional Development
 - EA's February 27th
 - Plan Updated
- WBWF and Bylaws Updated
- Osprey Wilds Recertification
 - Important Updates to Document
 - Attendance
 - Academics
 - Financial
 - Culturally Responsive Teaching for 2025-2026 and beyond
 - SPED Parent Advisory Council, Curriculum, and Title I Parent involvement
 - Policy updates
- MTSS and Data,
 - Assessment Data
 - Reading Corps- applied for 2025-2026
 - Data Days
 - School Growth
 - Instructional shifts

Executive Director's Monthly Report

March 25th, 2025

Executive Director Goals Update

- Budgeting for 2025-2026 Considerations/recommendations
 - Numbers of students and staff
 - Savings – Custodial services etc.
 - Staffing
 - Staff Development
 - Materials/Curriculum
- Family Engagement – February 27th meeting update
 - Breakout groups: Curriculum, Space, Fundraising
 - Next meeting March 27th at 6:00 PM
- Professional Development
 - April 4th CPI Training
- MTSS and Data,
 - Reading Corps awarded for 2025-2026 Full Time

Other Information:

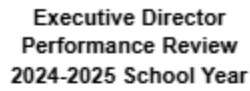
- New School Board Member Application:
 - Daniel Haugen
- Enrollment – Sarah
 - Lottery – Sarah
 - Space Configurations and groupings for 2025-2026
 - Decisions on capping enrollment 2025-2026
- Space Needs and Building Location
 - Meeting with CSDC Representative
- Staffing Update:
 - Teachers needed
 - Montessori Teacher Qualifications
 - Montessori Teacher Training and Hiring Expectation
 - Professional Development Plan Updates
- Forecasting 2025-2026 Budget
 - Changes in Salary and Benefits
 - Changes in Number of Students – drives the budget
 - Salaries and Benefits for 2025-2026 – Brooke Blomker
- Policies on Agenda
 - Review School Board Reflection
 - Review Executive Director's Evaluation Timeline – What needs to be in place next
- Environmental Updates – Lydia

Appendix D. Executive Director Performance Review Document, 2024-2025 SY



Executive Director Performance Review 2024-2025 School Year

Timeline	Objective	Date
Summer or Early Fall	Review committee and Executive Director review job description, evaluation process, forms, & timelines.	August
	Review committee and Executive Director identify acceptable supporting documents, information, evidence, and data to be used to measure performance.	August
	Review committee and Executive Director create goals and/or identify standards based on school priorities that are measurable and achievable in twelve months.	August
Spring	Each school board member receives the end-of-year summative evaluation form & the evaluation criteria.	Feb
	Executive director may complete a self-evaluation, with supporting documents, to be provided to the school board.	Feb
	Executive director makes end-of-year progress reports to the school board related to the goals and standards.	April
	School board members discuss the Executive Director's performance on each goal and/or standard. The school board may request an opportunity to prepare for the summative evaluation without the Executive Director's presence, but the school board cannot exclude the Executive Director.	April
	At the evaluation meeting, the school board chair leads the school board's review of the Executive Director's performance. The school board may close the meeting unless the Executive Director requests that the meeting be open. The school board should require that this request be in writing.	April
	At the next open meeting, the school board summarizes its conclusions regarding the summative evaluation, in compliance with Minnesota's Open Meeting Law.	May
	The final written summative evaluation form is placed in the Executive Director's personnel file.	May



1b. Goals and/or Strategic Plan

School Board - Governance Comments



School Finances				
2a. Budget development and maintenance				
Highly Effective (4)	Effective (3)	Developing (2)	Ineffective (1)	Score
Engages in timely budget planning and actions that consider current and long-range information and data; seeks balance to meet students' current and future needs and be fiscally responsible to community; distributes resources to meet immediate and long-range objectives.	Engages in proactive budget actions that consider current information and data; seeks balance to meet the students' needs and be fiscally responsible to community; distributes resources in light of school district goals and immediate objectives.	Budget development, resource allocations, and management is focused on meeting immediate needs and fiscal issues. Decisions are primarily reactive to current needs of the school district.	Budget knowledge is limited. Budget is developed and managed without taking into consideration current needs of the school district. Resources are allocated without consideration of school district needs.	
2b. Financial statements				
Highly Effective (4)	Effective (3)	Developing (2)	Ineffective (1)	Score
Provides constant flow of budgetary and/or financial information and discussion of ramifications of changes.	Regularly reports to the school board concerning budget and financial status.	Reports status of financial accounts as requested by school board.	Does not report financial information to school board other than annual audit.	
Total				

School Board - School Finances Comments



School Communication and Community Relationships				
3a. Relationships with the community				
Highly Effective (4)	Effective (3)	Developing (2)	Ineffective (1)	Score
Builds and sustains productive relationships with public and private sectors, such as local law enforcement, MSBA, MASA, etc.	Creates relationships with public and private sectors.	Reluctantly seeks some relationships with public or private sectors.	Has no relationships with public and private sectors and shows no interest in pursuing partnerships.	
3b. Engagement				
Highly Effective (4)	Effective (3)	Developing (2)	Ineffective (1)	Score
Seeks out and provides opportunities for input from external groups and individuals; uses the input in decision-making process.	Solicits input from select external groups and individuals.	Very rarely seeks input from external groups and individuals.	Demonstrates lack of regard for input and influence of external groups and individuals.	
3f. Visibility and approachability				
Highly Effective (4)	Effective (3)	Developing (2)	Ineffective (1)	Score
Is visible and approachable by members of the community; attends many and varied events.	Is visible and approachable by community; attends some events.	Attends few events and is seldom approachable by community.	Is neither visible nor approachable by community.	
Total Category Points				

School Board - School Finances Comments



Teaching and Learning				
6a. Staff development				
Highly Effective (4)	Effective (3)	Developing (2)	Ineffective (1)	Score
Ensures comprehensive staff development plan exists and aligns with school district and school specific goals and complies with law; assures staff development programs fit school district-specific plan, goals, and priorities and focus on increasing student achievement.	Ensures staff development plan exists and is followed most of the time; assures staff development programs are based upon available opportunities targeted toward staff growth and increasing student achievement.	A staff development plan in place, but not consistently followed; staff development programs are based upon available opportunities.	No comprehensive school district staff development plan; staff development not consistently provided; staff are left responsible for their improvement.	
6b. School improvement				
Highly Effective (4)	Effective (3)	Developing (2)	Ineffective (1)	Score
Ensures school improvement plans are in place at all buildings and align with school district-wide goals; assures plans and strategies are in place and used for implementing improvement efforts and monitoring progress.	Ensures school improvement plans are in place at all buildings and align with school district-wide goals.	School improvement plans are in place at building level, but lack school district-wide coordination	School improvement efforts are limited; no comprehensive plan in place.	
Total				

School Board - Teaching & Learning Comments



School Board - Evaluation Summary

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Category	Possible Score	Actual Score
Governance	4	
School Finances	8	
Communication & Community Relationships	12	
Teaching & Learning	8	
Total Performance Review Score		_____ / 32

Executive Director Full Name

Date

Executive Director Signature

Board Chair Signature

Appendix F. March 2025 financial statements executive summary.

**Three Rivers Montessori
Elk River, Minnesota
March 2025 Financial Statements
Executive Summary**

Summary of Key Financial Indicators

- * Average Daily Membership (ADM) Overview –
 - o Original Budget: 125
 - o Working Budget: 118
 - o Actual: 116
- * The School's projected net income for the year is \$134,723. This would result in a projected cumulative fund balance of \$218,211 or 11.3% of expenditures at fiscal year-end.

Financial Statement Key Points

- * As of month-end, 75% of the year was complete.
- * Cash Balance as of the reporting period is \$87,078, down from the previous month of \$120,425. This is to be expected at this point in the year.
- * Revenues received at end of the reporting period – 71.68%
 - o Food service revenues haven't been received since January.
- * Expenditures disbursed at end of the reporting period – 67.88%

Other Items

- * The working budget was adjusted to include library expenses that will be offset by library aid, additional adjustments were based on YTD spending.

Supplemental Information (see separate attachments)

A separate report is provided that shows the payment detail, receipts that were posted and journal entry transaction that were recorded during the month (if any).

Please contact Mindy Wachter at mindy.wachter@creativeplanning.com should you have any questions related to the financial statements.

Three Rivers Montessori
Elk River, Minnesota
Financial Statements Dashboard
As of March 31, 2025

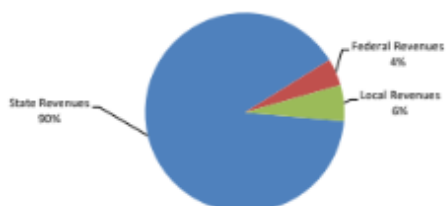
Financial Summary - Budgeted Amounts and Year to Date Activity

<i>Resources to Operate Programs (Revenues):</i>			<i>Funds Used to Provide Programs and Services (Expenses):</i>			<i>Excess / Deficit</i>
Approved Budget	\$2,305,019		Approved Budget	\$2,416,392		(\$111,373)
Working Budget	\$2,067,318		Working Budget	\$1,932,594		\$134,723
Year to Date	\$1,481,831	71.68%	Year to Date	\$1,311,909	67.88%	\$169,922

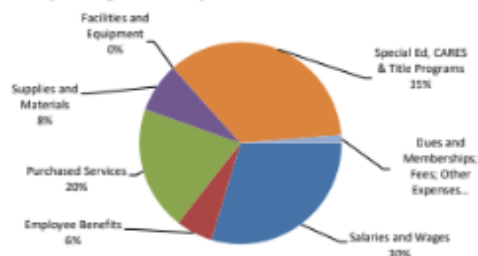


Budgets for the Year

Where funds will come from to operate the school:

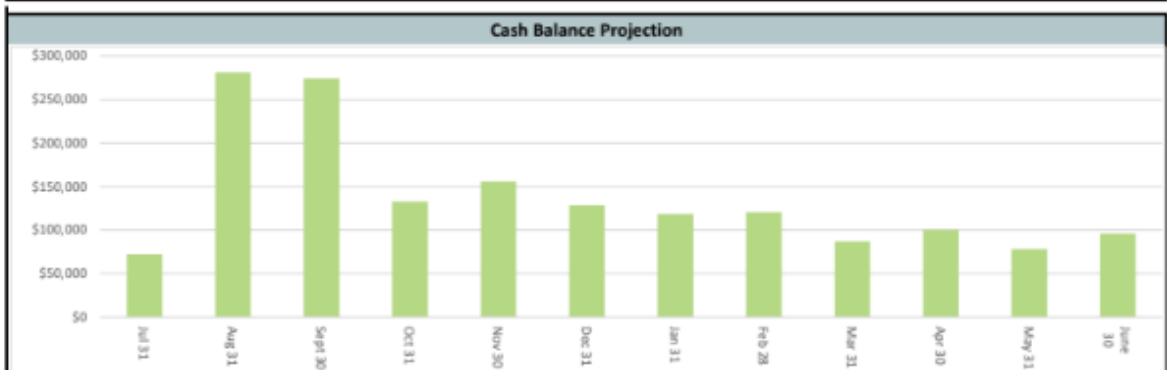
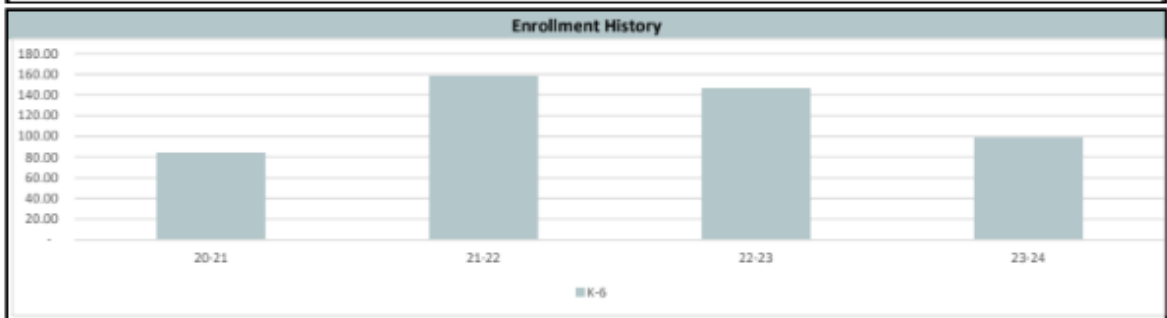
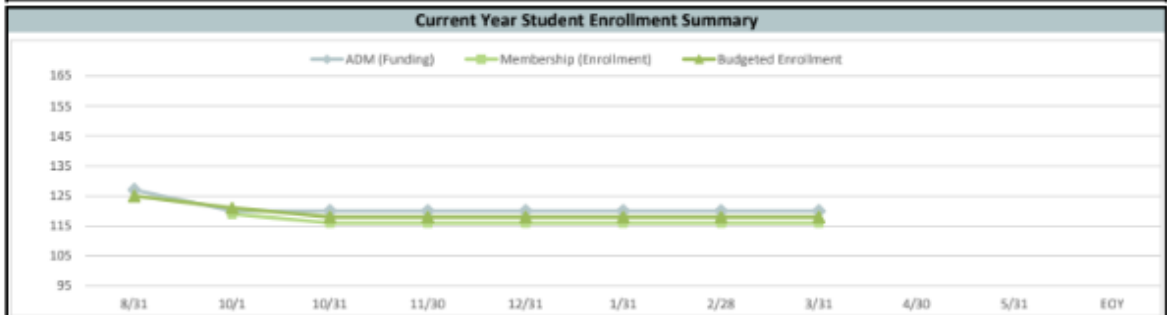


How the money is budgeted to be spent:



Fund Balance History





**Three Rivers Montessori
Elk River, Minnesota
Balance Sheet
As of March 31, 2025**

		Audited Balance 7-1-2024	Month Ending Balance
Assets			
Current Assets			
101	Main Bank	\$ 78,232	\$ 87,078
115	Accounts receivable	6,802	-
121	State aids receivable	273,866	(15,556)
	Current year state holdback		180,972
122	Federal aids receivable through MDE	11,948	82
	Current year federal holdback	-	11,437
131	Prepaid expenses	-	11
	Total all assets	\$ 370,848	\$ 264,025
Liabilities and Fund Balance			
Current Liabilities			
201	Salaries and wages payable	\$ 53,939	\$ 37,495
202	Sale of receivables / line of credit advances	125,000	-
206	Accounts payable	77,006	-
215	Payroll deductions and contributions payable	31,415	(26,880)
230	Deferred revenue - lunch accounts	-	-
	Total liabilities	287,360	10,615
Fund Balance			
	Unreserved fund balance	32,261	32,261
	Reserved Fund Balance - Library	20,000	20,000
	Reserved Fund Balance - Student Support	20,000	20,000
	Restricted fund balance - Community Service	11,226	11,226
	Net income to date	-	169,922
	Total fund balance	83,487	253,409
	Total liabilities and fund balance	\$ 370,848	\$ 264,025

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**Three Rivers Montessori
Elk River, Minnesota
Summary Revenue and Expense Statement
As of March 31, 2025**

		Months to Date		9	75.00%
		2024-2025 Original Budget	2024-2025 Working Budget	2024-2025 Year to Date Actual	Year to Date Percent of Working Budget
Projected Enrollment		125	118		0.00%
Weighted Average Daily Membership		125.00	118.00	116.00	98.31%
General Fund - 01					
Revenues					
State Revenues					
211	General education aid	1,023,849	966,391	738,034	76.37%
212	Literacy incentive aid	15,759	8,127	7,314	90.00%
201	Endowment fund apportionment	8,777	6,684	6,763	101.18%
348-300	Charter school lease aid	164,250	152,667	55,188	36.15%
317	Long-term facilities maintenance revenue	16,500	15,576	14,256	91.53%
360	Special education aid	711,425	600,178	307,172	51.16%
343	Library aid	19,916	20,000	10,414	52.07%
373	Student support aid	19,290	19,290	6,000	31.10%
369	Hourly worker unemployment	5,000	-	17,145	0.00%
356	READ Act Literacy Aid	-	3,954	2,372	60.00%
357	READ Act Training Aid	-	3,570	3,570	100.00%
071	Medical assistance billing revenue	2,296	2,296	2,309	100.55%
999	Prior year over/under accrual	-	-	-	0.00%
	Estimated state holdback	-	-	180,972	
	Total state revenues	1,987,062	1,798,933	1,351,509	75.13%
Federal Revenues					
401 414	Title programs	20,586	25,305	20,487	80.96%
419 425	Special education aid	23,013	15,363	4,352	28.33%
	Total federal revenues	43,599	40,668	24,839	61.08%
Local Revenues					
	Deposits without documentation	-	-	-	
050	Fees collected	6,172	5,826	1,769	30.36%
096	Gifts and donations	2,636	2,488	1,849	74.33%
099	Other local revenues	8,337	7,870	990	12.58%
621	Sales of materials purchased for resale	749	707	880	124.55%
	Total local revenues	17,892	16,890	5,488	32.49%
	Total revenues	\$ 2,048,554	\$ 1,856,492	\$ 1,381,836	74.43%
Expenditures					
General Fund					
100	Salaries	604,892	477,670	329,291	68.94%
200	Benefits	146,093	95,474	60,479	63.35%
	Projected salaries and benefits payable			28,903	
	Total salaries, wages, and benefits payable	750,985	573,144	418,673	73.05%
305	Contracted services	161,364	118,364	77,752	65.69%
315	Contracted technology services	2,591	591	-	0.00%
320	Communications services	5,202	5,202	3,715	71.41%
329	Postage	638	602	482	80.06%
330	Utilities cost	25,120	25,120	16,689	66.44%
340	Property and liability insurance	13,972	13,972	10,653	76.25%
350	Repairs and maintenance	27,615	25,509	22,626	88.70%
360	Contracted transportation - Field Trips	1,913	1,805	743	41.13%
366	Travel, conferences and staff training	5,272	4,136	1,296	31.33%
369	Field trips and other student fees	2,550	2,407	850	35.31%
348-370	Building lease cost	210,000	169,630	117,325	69.17%
335	Other rentals and operating leases	1,301	228	-	0.00%
380	Computer and tech related hardware rentals	11,019	10,402	6,909	66.42%
401	Supplies - non instructional	18,615	7,573	1,800	23.70%
405	Non instructional software and license fees	19,636	8,536	4,779	55.98%
406	Instructional software and license fees	4,579	3,323	1,932	58.13%
430	Instructional supplies	4,489	4,000	3,387	84.67%
455	Non-instructional technology supplies	893	843	-	0.00%
456	Instructional technology supplies	799	854	823	96.33%
460	Textbooks and workbooks	4,682	1,720	30	1.74%
461	Standardized Tests	2,000	2,000	-	0.00%

		Months to Date		9	75.00%
		2024-2025 Original Budget	2024-2025 Working Budget	2024-2025 Year to Date Actual	Year to Date Percent of Working Budget
466	instructional technology devices	2,049	934	-	0.00%
470	Library supplies (offset by Library Aid)		20,000	7,466	37.33%
490	Food purchased (not for food service)	925	205	58	28.37%
530	Other equipment purchased	3,188	-	-	0.00%
740	Interest on sale of receivables / line of credit	7,200	5,842	5,342	91.44%
820	Dues and memberships	21,129	18,129	13,250	73.09%
899	Transactions without documentation	-	-	57	0.00%
Subtotal general fund expenditures		1,308,724	1,625,071	716,637	68.93%
Title Programs					
100	Salaries	17,305	18,500	17,177	92.85%
200	Benefits	3,281	6,138	3,310	53.92%
366	Travel, conferences and staff training	-	-	-	0.00%
Subtotal title programs expenditures		20,586	25,305	20,487	80.96%
State Special Education					
100	Salaries	545,130	472,360	317,672	67.25%
200	Benefits	102,659	94,068	64,053	68.09%
307	Contracted substitutes	-	15,000	22,500	150.00%
394	Special education fees for services	98,958	48,496	27,636	56.99%
433	Individualized instructional materials	1,913	1,851	-	0.00%
466	Instructional technology devices	208	201	-	0.00%
372	MA Billing		2,296	1,006	43.83%
Subtotal state special education expenditures		748,868	634,272	432,867	68.25%
Federal Special Education					
303	Federal contracted services < \$25,000	7,890	-	-	0.00%
366	Travel, conferences and staff training	5,938	5,748	178	3.09%
401	Supplies - non instructional	422	409	500	122.39%
405	Non instructional software	1,682	2,352	2,368	100.67%
433	Individualized instructional materials	7,081	6,727	1,178	17.51%
466	Instructional technology devices	-	128	128	100.20%
Subtotal federal special education expenditures		23,013	15,367	4,352	28.33%
Subtotal all expenditures		2,102,191	1,700,012	1,174,343	69.08%
Transfer to food service fund		49,631	31,389	-	
Transfer to community service fund		8,104	(9,632)	-	
Total expenditures		\$ 2,159,926	\$ 1,721,769	\$ 1,174,343	68.21%
General fund net income		\$ (111,373)	\$ 134,723	\$ 207,493	

Food Services Fund - 02

Revenues					
300	State revenues	\$ 39,525	\$ 37,312	\$ 21,122	56.61%
400	Federal revenues	\$ 52,237	\$ 49,311	12,848	26.05%
600s	Sales of lunches, breakfasts, and milk	\$ -	\$ -	324	0.00%
Subtotal revenues		91,762	86,623	34,094	39.36%
Transfer from General Fund		49,631	31,389	-	
Total revenues		\$ 141,393	\$ 118,012	\$ 34,094	28.89%
Expenditures					
100	Salaries	28,200	11,930	12,250	102.68%
200	Benefits	4,470	4,304	2,566	59.62%
300	Purchased services	1,561	1,561	-	0.00%
401	Supplies and materials	4,254	3,072	559	18.20%
490/495	Food and milk	101,779	96,079	57,310	59.65%
820	Dues, memberships, other fees	1,130	1,066	700	65.65%
Total expenditures		\$ 141,393	\$ 118,012	\$ 73,385	62.18%
Food services fund net income		\$ -	\$ -	\$ (39,292)	

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		Months to Date		9	75.00%
		2024-2025 Original Budget	2024-2025 Working Budget	2024-2025 Year to Date Actual	Year to Date Percent of Working Budget
Community Services Fund - 04					
Revenues					
50	Before and After care fees	\$ 44,169	\$ 41,696	22,805	54.69%
40	Preschool fees	\$ 62,800	\$ 60,750	43,097	70.94%
	Subtotal revenues	106,969	102,446	65,902	64.33%
	Transfer from General Fund	8,104	(9,632)	-	
	Total revenues	\$ 115,073	\$ 92,814	\$ 65,902	71.00%
Expenditures					
Before and After care expenditures					
100	Salaries	42,200	37,205	33,756	90.73%
200	Benefits	6,914	6,123	4,593	75.01%
300	Purchased services	510	510	-	0.00%
401	Supplies and materials	893	893	-	0.00%
Preschool expenditures					
100	Salaries	53,856	40,000	21,667	54.17%
200	Benefits	9,170	6,554	3,341	50.99%
430	Supplies and materials	1,530	1,530	825	53.91%
	Total expenditures	\$ 115,073	\$ 92,814	\$ 64,181	69.15%
Community services fund net income		\$ -	\$ -	\$ 1,721	
Total All Funds					
Revenues					
	State revenues	\$ 2,026,587	\$ 1,836,245	\$ 1,372,631	74.75%
	Federal revenues	95,836	89,980	37,686	41.88%
	Local revenues	124,862	119,336	71,514	59.93%
	Fund transfers	57,735	21,757	-	
	Total revenues	\$ 2,305,019	\$ 2,067,318	\$ 1,481,831	71.68%
Expenditures					
	Salaries and wages	\$ 1,291,583	\$ 1,057,665	\$ 760,716	71.92%
	Employee benefits	272,587	212,660	138,342	65.05%
	Purchased services	583,411	451,578	309,354	68.51%
	Supplies and materials	178,429	163,897	84,148	51.34%
	Facilities and equipment	3,188	-	-	0.00%
	Dues and memberships; fees; other expenses	22,259	19,196	13,950	72.67%
	Fund transfers	57,735	21,757	-	0.00%
	Total expenditures	\$ 2,416,392	\$ 1,932,594	\$ 1,311,909	67.88%
	Total revenues all funds	\$ 2,305,019	\$ 2,067,318	\$ 1,481,831	71.68%
	Total expenditures all funds	2,416,392	1,932,594	1,311,909	67.88%
Net income - all funds		\$ (111,373)	\$ 134,723	\$ 169,922	
Beginning fund balance, district wide		83,487	83,487	83,487	
Ending fund balance, district wide		(27,885)	218,211	253,409	

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**Three Rivers Montessori
Cash Flow Projection Summary
2024-2025 School Year**

Period Ending	Cash Inflows (Revenues)						Cash Outflows (Expenditures)				Cash Balance
	State Aid Payments	Federal Aid Payments/ Food Service	Other Receipts	Line of Credit Draw	Prior Year State and Federal Receivable	Total Receipts	Salaries and Benefits (Net)	Other Expenses - AP	Payments Made on Line of Credit	Total Expenses	
										Beginning Balance	\$ 78,232
Jul 31	102,949	-	2,975	-	5,198	111,122	42,529	74,610	-	117,139	72,215
Aug 31	134,115	-	1,680	-	198,297	334,092	43,315	82,094	-	125,409	280,898
Sept 30	129,220	-	14,985	-	64,128	208,333	66,426	148,481		214,908	274,324
Oct 31	106,095	10,246	11,201	-	28,195	155,737	77,178	95,119	125,000	297,297	132,763
Nov 30	168,834	-	13,800	-	9	182,643	68,347	91,390	-	159,737	155,669
Dec 31	123,409	16,969	12,133	-	4	152,515	67,385	112,394	-	179,779	128,405
Jan 31	124,015	19,810	12,154	-	3,864	159,844	69,552	100,243	-	169,795	118,454
Feb 28	149,469	-	12,202	-	1,593	163,264	74,871	86,422	-	161,292	120,425
Mar 31	130,121	369	10,506	-	-	140,996	71,546	102,797	-	174,344	87,078
Apr 30	126,700	25,986	11,892	-	18,701	183,279	85,770	84,260	-	170,030	100,327
May 31	126,852	9,176	11,892	-	-	147,920	85,770	84,260	-	170,030	78,217
June 30	126,771	9,176	2,000	-	-	137,947	55,770	64,260	-	120,030	96,134
Totals	1,548,550	91,733	117,420	-	319,989	2,077,692	808,460	1,126,329	125,000	2,059,789	96,134
Projected Cash Flow for FY2025-2026											
Jul 31	125,000	5,000	4,000	-	10,000	144,000	40,000	71,908	-	111,908	128,225
Aug 31	125,000	5,000	2,000	-	71,957	203,957	45,000	100,000	-	145,000	187,183
Sept 30	140,000	10,000	7,000	-	53,968	210,968	90,000	100,000	-	190,000	208,151
Oct 31	140,000	20,000	7,000	-	35,979	202,979	90,000	100,000	-	190,000	221,129

Assumptions: 10% State Aid Holdback

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Appendix G. Letter of support from 22Beacon



(443) 561-1280

info@22beacon.org

April 9, 2025

Osprey Wilds Environmental Learning Center

Attn: Erin E. Anderson

1730 New Brighton Blvd

Suite 104, PMB 196

Minneapolis, MN 55413

Dear Ms. Anderson,

I am writing on behalf of 22Beacon Facilities Corporation, Inc. f/k/a CSDC Facilities Corporation, to express our strong support for Three Rivers Montessori ("TRM") and to advocate for the one-year extension of their charter contract. As the school's landlord and property owner of the facility housing the school, we have a unique perspective on both their challenges and their remarkable progress toward stability.

It is important to recognize that TRM demonstrated exceptional dedication by opening during the COVID-19 pandemic when they could have reasonably delayed their launch. This decision exemplifies their mission-driven approach and prioritization of student needs above operational convenience.

Like many charter schools during that unprecedented time, the school encountered obstacles, including leadership turnover that affected enrollment and teacher retention. These challenges temporarily impacted academic results, as well as their financial position, including their ability to meet full rent obligations. As their landlord, we recognized the school's potential and commitment to education, which led us to defer a portion of their rent payments for the past two school years and make strategic concessions to support their stabilization efforts.

I would like to emphasize the remarkable progress that has occurred under the direction of the new Executive Director, Paula Henry, since she took over operations for the 2024-25 school year:

1. The school has shown clear signs of operational stabilization
2. Financial management has improved significantly, transitioning from an operating deficit in 2023-24 to a projected surplus this year
3. Enrollment is now growing, despite previous setbacks

7880 Milestone Parkway, Suite 425 Hanover, MD 21076 | 7320 East Deer Valley Road, Suite 110, Scottsdale, AZ 85255

Our continued support through an affordable rent solution has contributed to this positive outlook, but the credit for this turnaround primarily belongs to the school's leadership and their diligent efforts to strengthen operations.

It is worth highlighting that one of the enrollment challenges the school faced was beyond their control. When forced to utilize district busing in the 2023-24 school year, they had to adjust their school start times to align with district schedules. This change unfortunately resulted in the loss of families who couldn't accommodate the new schedule. Despite this setback, the school has demonstrated resilience and is now rebuilding its student population.

The positive trajectory established in just one year under new leadership demonstrates TRM's capacity for growth, adaptation, and sound management. As their landlord, we have witnessed firsthand their commitment to fiscal responsibility and operational improvement. Non-renewal of their charter at this critical juncture would not only disrupt the educational experience of current students but would prevent the school from fully realizing its potential and serving the community as intended.

I urge you to consider the school's demonstrated commitment to improvement and the positive indicators of success when making your decision regarding their charter renewal. The school deserves the opportunity to continue building on this momentum and fulfilling its mission of providing quality education to our community's children.

Thank you for your consideration of this important matter.

Sincerely,



Michelle Prosperi

Chief Operating Officer

Appendix H. Communication samples from Dr Henry to families.

Dr. Paula Henry

Executive Director Three Rivers Montessori School

Greetings!

I am excited to serve Three Rivers Montessori School, the students, families, staff, and community as the next Executive Director. I promise to lead with compassion, heart, and joy, continuing to support the kindness and learning that grows here. I look forward to getting to know each and every one of you. My top priority is the well-being and success of all students and families.

In my time as an educator, I have learned a lot about empathy. While I always had care and concern for children and for people in general, my time as an educator has deepened it. I am eager to help children prepare for their futures and help Three Rivers Montessori School plan for success.

I am passionate about Montessori education and I am proud to share that my three children attended Montessori school. They have wonderful memories of joyful learning, making friends, building their sense of self, and exploring new concepts.

I am also passionate about shifting the paradigm for the future of learning for students, and empowering them to succeed in a world full of wonder and choices. I love observing students soar academically, and I find joy in their hopes and dreams.

Professionally, I am a former superintendent for Thief River Falls School District, and Lake Park Audubon School District in Minnesota. Prior to this I served as an elementary principal in West Fargo, ND. and as principal at Madison Elementary School in St. Cloud, MN. which was also home to Guang Ming Academy, a Chinese Immersion School. Many years before this I served as a Montessori School director in Madison Wisconsin.

My education includes a Doctorate in Educational Leadership, Superintendent licensure, Principal licensure, and a Masters in Curriculum and Instruction with a reading certification. I have over 30 years of experience in education and served in various roles leading teams of dedicated educators and administrators who shared a common vision of providing high quality and equitable learning opportunities for all students.

I have a depth of knowledge in district/school climate and culture, educational best practices, educational leadership, school finance, coaching, mentoring, systems change, and board and community collaboration. I love to build on people's strengths and connect teams for collaboration.

I am committed to excellence and uncompromising in my quest for quality educational opportunities for all young people. I never lose sight of students and their needs. I seek out collaborative solutions aimed at supporting parents, staff, and community.

I have a tremendous sense of pride for educators and have a high degree of respect for all who work in our noble profession. I am constantly in awe of colleagues and educators as they work tirelessly to inspire and empower our students. They show up each day and give their very best to our students. I am proud to walk alongside them.

Now, I am honored and humbled to be the Executive Director of Three Rivers Montessori School. I will proudly serve students, staff, families, and the community.

Kind regards,

Dr. Paula Henry

Executive Director



Reading with your child for just 20 minutes each evening can open up a world of adventure and learning. From far-off lands to solving mysteries, reading not only builds essential skills but also strengthens family bonds. Here's how you can make reading a joyful and regular part of your family's routine.

Why 20 Minutes?

Setting aside 20 minutes for reading is a manageable and impactful time commitment that can significantly benefit your child's development. It boosts imagination, enhances language skills, and creates cherished moments together.

How to Get Started

1. **Read Together Daily:** Choose a book, find a cozy spot, and dive into a story. Whether you read to them, they read to you, or you read together, the goal is to make reading enjoyable.
2. **Log Your Adventures:** Use your "Reading Log" to track your reading journey. It's a fun way to celebrate the stories you've explored and reflect on favorite moments.

Tips for a Great Reading Routine

- **Create a Special Reading Space:** Transform a corner of your home into a reading nook or build a blanket fort to make reading time magical.
- **Mix It Up:** Explore a variety of books, from comics and cookbooks to audiobooks and e-books, to keep things exciting.
- **Get Creative:** Use funny voices, make predictions, or act out scenes to enhance the reading experience.

More Tips for Parents

- **Be a Reading Role Model:** Let your child see you reading and share your experiences to show that reading is valuable and enjoyable.
- **Choose Books Together:** Encourage your child to pick books that interest them, fostering excitement and engagement.
- **Ask Open-Ended Questions:** Engage in discussions about the stories to improve comprehension and critical thinking.
- **Connect Reading to Real Life:** Relate stories to real-world experiences to reinforce the relevance of reading.
- **Celebrate Progress:** Praise efforts and progress, building confidence and motivation.

By implementing these strategies, you can create a supportive environment that fosters a lifelong love for reading. Start your family's reading adventure tonight and join a community of readers ready to explore new ideas and worlds.

Ready, Set, Read!

Appendix I. Current lease amendment, effective March 10, 2025.

THIRD AMENDMENT TO AGREEMENT OF LEASE

This **Third Amendment to Agreement of Lease** (this "**Third Amendment**") is made and entered into effective as of March 10, 2025 by and between **CSDC FACILITIES CORPORATION**, a District of Columbia nonprofit corporation ("**Landlord**"), and **THREE RIVERS MONTESSORI**, a Minnesota nonprofit corporation ("**Tenant**").

RECITALS

A. Landlord and Tenant are parties to that certain Agreement of Lease dated June 17, 2020, as amended by that certain First Amendment to Agreement of Lease dated as of May 17, 2021, which was further amended by that certain Second Amendment to Agreement of Lease dated November 15, 2023, and as further amended by this Third Amendment (collectively, the "**Lease**").

B. Landlord and Tenant wish to further amend the Lease by amending the schedule of Minimum Annual Base Rent, as described in Section 3 of the Lease as further amended herein, and attached hereto as Exhibit A.

AMENDMENT

1. Minimum Base Rent.

- i. In Section 3.B., the Minimum Annual Base Rent will be as stated on Exhibit A attached hereto.
- ii. Additionally, the "Difference Added to Purchase Option Price" listed in column D of Exhibit A, shall be deemed to be abated Base Annual Rent and added to the Purchase Option Price as described in Section 3.J.

2. Miscellaneous.

- i. Except as specifically stated herein, all other terms, conditions and provisions of the Lease remain in full force and effect.
- ii. This Third Amendment may be executed in counterparts, each of which shall be deemed an original (including copies sent to a party by facsimile or pdf transmission) as against the party signing such counterpart, but which together shall constitute one and the same Third Amendment.

IN WITNESS WHEREOF, the parties have caused this Third Amendment to be duly executed as of the day and year first above written.

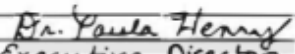
LANDLORD: CSDC FACILITIES CORPORATION  By: Michelle Prosperi Its: Chief Operating Officer	TENANT: THREE RIVERS MONTESSORI Paula Henry By:  Its: Executive Director
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EXHIBIT A

BASE RENT

<u>Lease Year</u>	<u>Annual Minimum Base Rent Amount</u>	<u>Adjusted Annual Minimum Base Rent Amount</u>	<u>Difference Added to Purchase Option Price</u>
2023-2024	\$258,003	\$198,003	\$60,000
2024-2025	\$219,875	\$169,360	\$50,515
2025-2026	\$230,345	\$205,803	\$24,542
2026-2027	\$255,473	\$219,000	\$36,473
2027-2028	\$258,028		
2028-2029	\$260,608		
2029-2030	\$263,214		
2030-2031	\$265,847		
2031-2032	\$268,505		
2032-2033	\$271,190		
2033-2034	\$273,902		
2034-2035	\$276,641		
2035-2036	\$279,407		
2036-2037	\$282,201		
2037-2038	\$285,023		
2038-2039	\$287,874		
2039-2040	\$290,752		
2040-2041	\$293,660		
2041-2042	\$296,597		
2042-2043	\$299,563		
2043-2044	\$302,558		
2044-2045	\$305,584		
2045-2046	\$308,640		
			Total added to Total Project Cost and included in Purchase Price.
			<u>\$171,529.68</u>

Three Rivers Montessori

Indicator 1: Mission Related

Measure 1.1 Performance Data:

Minnesota Executive Function Scale

Three Rivers Montessori	Number of Students Scoring 'Meets' or Above on the Minnesota Executive Function Scale Minnesota Executive Function Scale	Total number of students assessed	Percent of Students Scoring 'Meets' or Above on the Minnesota Executive Function Scale Minnesota Executive Function Scale	Annual Change over Baseline
FY19*				
FY20*				
FY21	50	74	67.6%	N/A
FY22	135	161	83.9%	16.3%
FY23	97	140	69.3%	1.7%
Aggregate	282	375	75.2%	7.6%
FY22-FY24 Aggregate	232	301	77.1%	9.5%

Data Source: Data provided to OW by school

*TRM not yet established as a school

Three Rivers Montessori	Number of Students Scoring Proficient on Montessori Survey - Fall	Number of Students Scoring Proficient on Montessori Survey - Spring	Total Number of Students	Percentage Points Change in Growth from Fall to Spring	Percent of Students Scoring Proficient
FY24				#DIV/0!	
Aggregate	0	0	0	#DIV/0!	#DIV/0!

Indicator 3: Reading Growth

Measure 3.1 Performance Data:

Reading: North Star Academic Progress -- All Students (Meeting enrollment criteria)

Three Rivers Montessori	Count whose reading achievement level improved	Count tested	Percent of Students whose achievement level improved
FY21*			
FY22			
FY23	4	37	10.8%
FY24	2	28	7.1%
Aggregate	6	65	9.2%

Source: Requested data provided to OW by school

Reading: North Star Academic Progress -- All Students (Meeting enrollment criteria)

State of Minnesota	Count whose reading achievement level improved	Count tested	Percent of Students whose achievement level improved
FY21*			
FY22	49599	245117	20.2%
FY23	51212	284046	18.0%
FY24	55303	289929	19.1%
Aggregate	156114	819092	19.1%

Source: MDE Data Center

*All students if enrollment criteria is not calculated

Measure 3.2 Performance Data:

Reading: North Star Academic Progress -- All Students (Meeting enrollment criteria)

Three Rivers Montessori	Count whose reading achievement level decreased or stayed "does not meet standards"	Count tested	Percent of Students whose achievement level stayed "does not meet" or decreased
FY21*			
FY22			
FY23	32	37	86.5%
FY24	20	28	71.4%
Aggregate	52	65	80.0%

Source: Requested data provided to OW by school

Reading: North Star Academic Progress -- All Students (Meeting enrollment criteria)

State of Minnesota	Count whose reading achievement level stayed "does not meet" or decreased	Count tested	Percent of Students whose achievement level stayed "does not meet" or decreased
FY21*			
FY22	90144	245117	36.8%
FY23	113661	284046	40.0%
FY24	113049	289929	39.0%
Aggregate	316854	819092	38.7%

Source: MDE Data Center

Measure 3.3 Performance Data:

FastBridge -- Reading, Grades 1-8

Three Rivers Montessori	Number of students that are 'Low Risk' or higher on spring post-test	Number of students that moved from "High Risk" to "Some Risk" from fall to spring	Total number of students with a pre-test and post-test	Combined percentage of students meeting targets
FY20*				
FY21				
FY22	93	3	157	61.1%
FY23	35	9	90	48.9%
Aggregate	128	12	247	56.7%

Data Source: Data provided to OW by school

*TRM not yet established as a school

Measure 3.4 Performance Data:

Reading: NWEA (Grades 1-6)

Three Rivers Montessori	Number of Students Meeting Fall to Spring NWEA RIT Expected Growth Target	Total Number of Students	Percentage of Students Meeting Fall to Spring NWEA RIT Expected Growth Target
FY24	29	66	43.9%
Aggregate	29	66	43.9%

Data Source: Data provided to OW by school

Indicator 4: Math Growth

Measure 4.1 Performance Data:

Math: North Star Academic Progress -- All Students (Meeting enrollment criteria)

Three Rivers Montessori	Count whose math achievement level improved	Count tested	Percent of Students whose achievement level improved
FY21*			
FY22			
FY23	1	37	2.7%
FY24	2	28	7.1%
Aggregate	3	65	4.6%

Source: Requested data provided to OW by school

Math: North Star Academic Progress -- All Students (Meeting enrollment criteria)

State of Minnesota	Count whose math achievement level improved	Count tested	Percent of Students whose achievement level improved
FY21*			
FY22	44136	241968	18.2%
FY23	41951	282652	14.8%
FY24	41023	288827	14.2%
Aggregate	127110	813447	15.6%

Source: MDE Data Center

*All students if enrollment criteria is not calculated

Measure 4.2 Performance Data:

Math: North Star Academic Progress -- All Students (Meeting enrollment criteria)

Three Rivers Montessori	Count whose achievement level decreased or stayed "does not meet standards"	Count tested	Percent of Students whose achievement level stayed "does not meet" or decreased
FY21*			
FY22			
FY23	32	37	86.5%
FY24	23	28	82.1%
Aggregate	55	65	84.6%

Source: Requested data provided to OW by school

*All students if enrollment criteria is not calculated

Math: North Star Academic Progress -- All Students (Meeting enrollment criteria)

State of Minnesota	Count whose achievement level stayed "does not meet" or decreased	Count tested	Percent of Students whose achievement level stayed "does not meet" or decreased
FY21*			
FY22	96749	241968	40.0%
FY23	123370	282652	43.6%
FY24	125819	288827	43.6%
Aggregate	345938	813447	42.5%

Source: MDE Data Center

Measure 4.3 Performance Data:

Three Rivers Montessori	Number of students that are 'Low Risk' or higher on spring post-test	Number of students that moved from "High Risk" to "Some Risk" from fall to spring	Total number of students with a pre-test and post-test	Combined percentage of students meeting targets
FY20				
FY21				
FY22	91	3	157	59.9%
FY23	35	6	90	45.6%
Aggregate	126	9	247	54.7%

Data Source: Data provided to OW by school

*TRM not yet established as a school

Measure 4.4 Performance Data:

Reading: NWEA (Grades 1-6)

Three Rivers Montessori	Number of Students Meeting Fall to Spring NWEA RIT Expected Growth Target	Total Number of Students	Percentage of Students Meeting Fall to Spring NWEA RIT Expected Growth Target
FY24	30	71	42.3%
Aggregate	30	71	42.3%

Data Source: Data provided to OW by school

Indicator 5: Reading Proficiency

Measures 5.1- 5.2 Performance Data:

Reading: All State Accountability Tests, All Students (Meeting enrollment criteria), Grade 3

Three Rivers Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19**	N/A	N/A	N/A	N/A		
FY20						
FY21*	*	*	*	*	*	50.0
FY22	*	*	*	*	*	52.0
FY23	1	4	6	10	21	38.1
FY24	1	1	1	8	11	22.7
Aggregate	5	17	10	32	64	42.2
FY22-FY24 Aggregate	*	*	*	*	*	41.2

Data Source: Data provided to OW by school

*Data suppressed for n size less than 10

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	5,613	20,085	8,522	18,789	53,009	56.5
FY22	6,790	21,935	9,403	20,756	58,884	56.8
FY23	6,630	21,858	9,584	21,319	59,391	56.0
FY24	6,246	21,751	9,635	21,579	59,211	55.4
Aggregate	25,279	85,629	37,144	82,443	230,495	56.2
FY22-FY24 Aggregate	19666	65544	28622	63654	177,486	56.1

Source: MDE Data Center

Elk River Public Schools (ISD 728)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	145	451	143	230	969	68.9
FY22	161	436	184	243	1,024	67.3
FY23	166	513	158	227	1,064	71.2
FY24	182	486	158	243	1,069	69.9
Aggregate	654	1,886	643	943	4,126	69.4
FY22-FY24 Aggregate	509	1435	500	713	3,157	69.5

Source: MDE Data Center

*All students if enrollment criteria is not calculated

Measures 5.3-5.4 Performance Data:

Reading: All State Accountability Tests, All grades except 3 (Grades 4-6)

Three Rivers Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	4	3	8	6	21	52.4
FY22	1	8	9	4	22	61.4
FY23	3	3	3	29	38	19.7
FY24	1	8	3	20	32	32.8
Aggregate	9	22	23	59	113	37.6
FY22-FY24 Aggregate	5	19	15	53	92	34.2

Data Source: Data provided to OW by school

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	24555	61762	33308	38425	158,050	65.2
FY22	28687	69344	36720	43277	178,028	65.4
FY23	27,200	68,147	35,958	45,143	176,448	64.2
FY24	28,783	69,423	37,147	46,093	181,446	64.4
Aggregate	109,225	268,676	143,133	172,938	693,972	64.8
FY22-FY24 Aggregate	84670	206914	109825	134513	535,922	64.7

Source: MDE Data Center

Elk River Public Schools (ISD 728)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	490	1208	552	422	2,672	73.9
FY22	564	1379	587	476	3,006	74.4
FY23	605	1393	580	516	3,094	73.9
FY24	680	1,405	607	519	3,211	74.4
Aggregate	2,339	5,385	2,326	1,933	11,983	74.2
FY22-FY24 Aggregate	1849	4177	1774	1511	9,311	74.2

Source: MDE Data Center

*All students if enrollment criteria is not calculated

Measures 5.5-5.6 Performance Data:

Reading: All State Accountability Tests-- Free/Reduced Price Lunch

Three Rivers Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	*	*	*	*	*	16.7
FY22	*	*	*	*	*	0.0
FY23	0	1	3	12	16	15.6
FY24	0	2	3	15	20	17.5
Aggregate	0	3	7	31	41	15.9
FY22-FY24 Aggregate	*	*	*	*	*	15.8

Data Source: Data provided to OW by school

*Data suppressed for n size less than 10

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	3707	19267	15734	32188	70,896	43.5
FY22	4266	21675	17346	35925	79,212	43.7
FY23	6,437	30,412	22,610	44,910	104,369	46.1
FY24	6,762	30,430	22,621	44,911	104,724	46.3
Aggregate	21,172	101,784	78,311	157,934	359,201	45.1
FY22-FY24 Aggregate	17465	82517	62577	125746	288,305	45.5

Source: MDE Data Center

Elk River Public Schools (ISD 728)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	49	201	125	151	526	59.4
FY22	34	175	122	147	478	56.5
FY23	126	417	243	307	1,093	60.8
FY24	129	419	228	293	1,069	61.9
Aggregate	338	1,212	718	898	3,166	60.3
FY22-FY24 Aggregate	289	1011	593	747	2,640	60.5

Source: MDE Data Center

*All students if enrollment criteria is not calculated

Measures 5.7-5.8 Performance Data:

Reading: All State Accountability Tests, Special Education

Three Rivers Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	*	*	*	*	*	30.0
FY22	*	*	*	*	*	45.5
FY23	2	2	2	14	20	25.0
FY24	1	2	1	16	20	17.5
Aggregate	4	7	8	37	56	26.8
FY22-FY24 Aggregate	*	*	*	*	*	26.5

Data Source: Data provided to OW by school

*Data suppressed for n size less than 10

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	2242	7071	5602	19011	33,926	35.7
FY22	3099	8978	6903	22288	41,268	37.6
FY23	2,844	8,626	6,378	23,129	40,977	35.8
FY24	3,037	9,015	7,018	24,594	43,664	35.6
Aggregate	11,222	33,690	25,901	89,022	159,835	36.2
FY22-FY24 Aggregate	8980	26619	20299	70011	125,909	36.3

Elk River Public Schools (ISD 728)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	51	156	98	263	568	45.1
FY22	65	168	129	311	673	44.2
FY23	69	179	120	337	705	43.7
FY24	69	181	130	302	682	46.2
Aggregate	254	684	477	1,213	2,628	44.8
FY22-FY24 Aggregate	203	528	379	950	2,060	44.7

Source: MDE Data Center

*All students if enrollment criteria is not calculated

Indicator 6: Math Proficiency

Measures 6.1-6.2 Performance Data:

Math: All State Accountability Tests – All Students

Three Rivers Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	3	3	7	15	28	33.9
FY22	4	9	11	23	47	39.4
FY23	4	7	9	43	63	24.6
FY24	1	7	9	26	43	29.1
Aggregate	12	26	36	107	181	30.9
FY22-FY24 Aggregate	9	23	29	92	153	30.4

Data Source: Data provided to OW by school

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	34558	64678	46165	64122	209,523	58.4
FY22	43786	74465	49130	68856	236,237	60.5
FY23	44,997	74,269	48,973	67,215	235,454	61.1
FY24	46,271	75,632	50,466	67,952	240,321	61.2
Aggregate	169,612	289,044	194,734	268,145	921,535	60.3
FY22-FY24 Aggregate	135054	224366	148569	204023	712,012	60.9

Elk River Public Schools (ISD 728)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	796	1293	827	722	3,638	68.8
FY22	1035	1489	837	667	4,028	73.1
FY23	1167	1561	790	611	4,129	75.6
FY24	1,203	1,636	815	615	4,269	76.0
Aggregate	4,201	5,979	3,269	2,615	16,064	73.5
FY22-FY24 Aggregate	3405	4686	2442	1893	12,426	74.9

Source: MDE Data Center

*All students if enrollment criteria is not calculated

Measures 6.3-6.4 Performance Data:

Math: All State Accountability Tests – Free/Reduced Price Lunch

Three Rivers Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	*	*	*	*	*	0.0
FY22	*	*	*	*	*	0.0
FY23	0	3	5	8	16	34.4
FY24	0	2	4	14	20	20.0
Aggregate	0	5	9	27	41	23.2
FY22-FY24 Aggregate	*	*	*	*	*	25.0

Data Source: Data provided to OW by school

*Data suppressed for n size less than 10

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	3634	13864	15358	37199	70,055	35.9
FY22	4689	16632	17174	40353	78,848	37.9
FY23	8,101	24,607	23,624	47,777	104,109	42.8
FY24	8,369	24,814	23,932	47,298	104,413	43.2
Aggregate	24,793	79,917	80,088	172,627	357,425	40.5
FY22-FY24 Aggregate	21159	66053	64730	135428	287,370	41.6

Elk River Public Schools (ISD 728)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	47	146	136	195	524	49.8
FY22	59	135	120	163	477	53.2
FY23	168	384	244	296	1,092	61.7
FY24	164	389	234	277	1,064	63.0
Aggregate	438	1,054	734	931	3,157	58.9
FY22-FY24 Aggregate	391	908	598	736	2,633	60.7

Source: MDE Data Center

*All students if enrollment criteria is not calculated

Measures 6.5-6.6 Performance Data:

Math: All State Accountability Tests – Special Education

Three Rivers Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	*	*	*	*	*	25.0
FY22	*	*	*	*	*	22.7
FY23	1	2	3	14	20	22.5
FY24	1	2	2	15	20	20.0
Aggregate	3	6	6	40	55	21.8
FY22-FY24 Aggregate	*	*	*	*	*	21.6

Data Source: Data provided to OW by school

*Data suppressed for n size less than 10

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	2638	6438	5788	18862	33,726	35.5
FY22	3742	8674	7192	21587	41,195	38.9
FY23	3,940	8,341	7,122	21,601	41,004	38.6
FY24	4,174	8,916	7,673	22,913	43,676	38.8
Aggregate	14,494	32,369	27,775	84,963	159,601	38.1
FY22-FY24 Aggregate	11856	25931	21987	66101	125,875	38.8

Elk River Public Schools (ISD 728)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	66	136	114	253	569	45.5
FY22	98	147	137	292	674	46.5
FY23	92	185	139	286	702	49.4
FY24	100	176	123	280	679	49.7
Aggregate	356	644	513	1,111	2,624	47.9
FY22-FY24 Aggregate	290	508	399	858	2,055	48.5

Source: MDE Data Center

*All students if enrollment criteria is not calculated

Indicator 7: Science Proficiency

Measures 7.1-7.2 Performance Data:

Science: All State Accountability Tests – All Students

Three Rivers Montessori	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	*	*	*	*	*	61.1
FY22	*	*	*	*	*	56.3
FY23	0	4	1	8	13	34.6
FY24	2	3	2	6	13	46.2
Aggregate	3	15	5	20	43	47.7
FY22-FY24 Aggregate	*	*	*	*	*	44.1

Data Source: Data provided to OW by school

*Data suppressed for n size less than 10

State of Minnesota	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	3960	21160	12788	14524	52,432	60.1
FY22	4507	25551	13216	16893	60,167	60.9
FY23	5,473	23,484	13,623	17,239	59,819	59.8
FY24	4,026	23,669	14,950	18,874	61,519	57.2
Aggregate	17,966	93,864	54,577	67,530	233,937	59.5
FY22-FY24 Aggregate	14006	72704	41789	53006	181,505	59.3

Elk River Public Schools (ISD 728)	Exceeds	Meets	Partially Meets	Does Not Meet	Total	Proficiency Index
FY19	N/A	N/A	N/A	N/A		
FY20						
FY21*	97	426	230	165	918	69.5
FY22	99	473	202	191	965	69.7
FY23	120	483	262	226	1,091	67.3
FY24	76	505	278	226	1,085	66.4
Aggregate	392	1,887	972	808	4,059	68.1
FY22-FY24 Aggregate	295	1461	742	643	3,141	67.7

Source: MDE Data Center

*All students if enrollment criteria is not calculated

Indicator 10: Attendance

Measure 10.1 Performance Data:

Attendance: Attendance Rate

Three Rivers Montessori	Count Consistently Attending	Total	Annual Consistent Attendance Rate
FY21			
FY22	79	111	71.2%
FY23	79	125	63.2%
FY24			
Average	158	236	67%

Source: Requested data provided to OW by school

Elk River Public Schools (ISD 728)	Count Consistently Attending	Total	Annual Consistent Attendance Rate
FY21			
FY22	9037	12499	72.3%
FY23	10,145	12722	79.7%
FY24			
Average	19182	25221	76%