November 10, 2018
Quarterly Board Meeting
The Montessori School of Englewood
6936 South Hermitage Ave.
Chicago, Illinois 60636

Present:

> Board Members: Thom Hale, Jim Sulzer, Joe Motto, Peter Cunningham (by phone), Mike Sculnick, Karen Anderson, Hubert Morgan, Gabrielle Sansonetti, Keisha Johnson, Peter Talmers

> Executive Director: Rita Nolan

> Visitors: Seth Kaufman (Focus Strategic Partners), Judy Gadiel and Emily Halpern (Giving Tree Associates), Ebony Townsend (school parent and digital marketing coordinator)

> Minutes taken by: Joe Motto

I.   Call to Order

Hale called the meeting to order.

II.   Chicago Montessori Residency and Organization Structuring

Hale shared congratulations with Nolan, Maggie Mikuzis, and Stephanie McDermott relating to the fact that the Montessori Accreditation Council for Teacher Education accredited the Chicago Montessori Residency for 6-9 and 9-12 level training. This past summer, the program began the process to become accredited for the 3-6 level.

Discussion was had concerning that we will want to seek funding and grants under a separate entity housing CMS, apart from the school itself. Motto described that he has been in discussions with Sally Wagenmaker, a Chicago attorney who provides counsel for nonprofits, including educational institutions, on tax and structuring issues.

III.   CPS Accountability Letter and SQRP Scoring

Hale led a lengthy discussion concerning the CPS accountability letter concerning the school's Level 3 School Quality Rating Policy score and related materials that were delivered to

the board via Hale on November 1, 2018, which were distributed in advance of the meeting. *See* Ex. A. The board discussed the criteria that must be satisfied for the school to be removed from the Academic Warning List and exit the Revocation Process by the end of the 2018-2019 school year. School leaders had a positive meeting with CPS Innovation and Incubation to kick off the process. We must submit our response plan by December 10, meet the required timelines, and achieve a SQRP rating of better than 3.2. It was stressed that the board and executive committee must be closely involved in this process and review and discuss at the board and executive committee meetings the pertinent data and information as we progress through the plan.

Kaufman presented and talked with the board in great depth through the various items that factor into the SQRP score and the school's results and NWEA testing in recent years. *See* Ex. B. Looking at our fall results, we are trending in the right direction, up from the results in the spring. We will have another data point once we see the winter test results. Kaufman will be advising and helping us monitor and make decisions in response to the data during the year.

IV.   Finance

Sculnick led discussion of current finance items. We have been finalizing the audit of school year 2017-2018, which reflects a deficit of $188,000 for the year. Partly in relation to that, we have revised our 2018-2019 budget to now project a $152,000 surplus, brought about through a reduction in staff headcount and certain programming. Another assumption in the budget is that we will fundraise $450,000. *See* Ex. C. We have confirmed an additional 20 preschool slots for this year, which bodes well for the future.

Discussion was also had concerning the school's line of credit with Inland Bank, which must be renewed annually. Sculnick recused himself from the discussion. Anderson moved for a resolution that the board apply for a renewal of the line of credit and authorize the executive committee—exclusive of Sculnick, who has recused from the matter—to take such steps as are necessary to effect that renewal. Morgan seconded the motion. All members present other than Sculnick voted in favor, none opposed. Motion passed.

V.   Giving Tree

Gadiel and Halpern gave a presentation on Giving Tree's assessment of and recommendations for the school. *See* Ex. D. They described the overview of their assessment process, which prioritized: (1) board and leadership development; (2) campaign; (3) communications; and (4) infrastructure support. The board discussed Giving Tree's various recommendations, the primary of which are that the board create a governance committee

(among other restructuring recommendations), and that the board hire a full-time director of development.

Sansonetti made a motion to empower the board to create a governance committee and to empower the executive committee to determine the appropriate composition and membership, including chairperson, of that committee. Anderson seconded. All voted in favor, none opposed. Motion passed.

It was also discussed and agree that we will need to organize and fund a development director, as recommended, but that we will have to prioritize that appropriately in relation to more immediate funding needs.

VI. Executive Director's Report

Nolan distributed and led discussion as to certain aspects of the executive director's report. *See* Ex. E.

VII. Prior Board Meeting Minutes

The minutes from the May, June, and July 2018 quarterly board meeting were circulated for re-review in advance of the meeting. Anderson moved to approve those minutes. Sculnick seconded. All voted in favor, none opposed. Motion passed.

VIII. Community Engagement

Morgan discussed recent community engagement developments. He and Marv Hoffman were recently approached by a former student of Hoffman's who is affiliated with the South Chicago Dance Theatre and presented an opportunity to bring dance into the community. Morgan will discuss the opportunity with Mikuzis.

There was also discussion that our original mission was not just to start a school, but to help the greater community, and that we should make sure the board is connected to the parents and families of the students and welcomes them to the board meetings.

IX. Facilities

A facilities report from Joe Agate was distributed and made available at the meeting, which describes building improvements that have been made and ongoing projects. *See* Ex. F.

X.   Head Start

Discussion was that the Head Start policy committee met for their third policy meeting and related items. Anderson moved for the board to approve the accompanying minutes. *See* Ex. G. Morgan seconded. All voted in favor; none opposed. Motion passed.

XI.   Public Comments

Opportunity was given for public comment. Townsend discussed her efforts to connect the school with the community and student families via social media and other outlets.

XII.   Adjournment

With no further business, the meeting was adjourned.

The next quarterly board meeting will be held on February 11, 2019, at Winston & Strawn LLP, at 6:00 p.m.

Exhibit A

_____

November 1, 2018

Tom Hale
Board President
Montessori School of Englewood Charter School
6936 South Hermitage
Chicago, Illinois, 60636

Dear Tom Hale:

We are pleased to announce the release of SQRP (School Quality Rating Policy) ratings for the 2018-2019 School Year. Our collective goal at Chicago Public Schools is to provide every child from every neighborhood with access to a high-quality education that prepares them for success in college, career and life. Through this annual rating, families are empowered with information about school performance and the District is able to accurately gauge school progress and provide remediation to those schools experiencing challenges.

Per your agreement with the Board of Education, your school's academic performance is evaluated annually based on the School Quality Rating Policy. In addition, the Charter School Quality Policy, articulates the academic performance levels under which Charter Schools are identified on the Academic Warning List. A charter school or campus shall be placed on the Academic Warning List, if the charter school or campus:

- Has a SQRP rating of Level 3; or
- Has a two-year SQRP point value average of 2.5 or lower; or
- Has a SQRP rating of Level 2 in three consecutive years.

Based on criteria established through the School Quality Rating Policy, Montessori Englewood Charter School has achieved a rating of **Level 3** based on performance during the 2017-2018 school year. As a result of this rating and other criteria established in the SQRP and the Charter School Quality Policy, Montessori Englewood has been placed on the Charter School Academic Warning List for the 2018- 2019 School Year. This identification starts the Charter Revocation Process. Additionally, as a result of this rating, the school is "Failing to Meet or Make Reasonable Progress".

The criteria to be placed on the Charter School Academic Warning List and begin the Revocation Process has been defined in the Charter School Quality Policy adopted by the Board of Education. In accordance with Illinois School Code [105 ILCS 5/27 A-9, Sec. 27A-9(c)], when a charter school or campus has "Failed to Meet or Make Reasonable Progress," it becomes eligible for revocation.

- To be removed from the Academic Warning List and exit the Revocation Process by the end of the 2018-2019 school year, your campus must not meet the criteria to be included in the Academic Warning List (as per the Charter School Quality Policy) and must have successfully implemented its remediation plan with fidelity. If the campus does not meet this criterion, the campus may be subject to closure in the 2019 – 2020 School Year.

Office of Innovation and Incubation • Mary K. Bradley, Executive Director
42 W. Madison, 3rd Floor• Chicago, IL 60602 • Phone: 773-553-1530 • Fax: 773-553-1035

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One of the purposes of SQRP is to provide a framework for schools and campuses to set goals and strategies for continuous improvement. Schools and campuses have the opportunity to review SQRP data rosters, calculate preliminary ratings in an effort to measure performance and understand what specific steps are need for continuous improvement. The Academic Remediation process allow schools and campuses to use SQRP results, build upon identified strategies and systems that may improve overall school or campus performance. Participating in the Academic Remediation process is not meant to be cumbersome, but more of a structured process where schools or campuses implement identified targeted strategies, action steps, and deliverables from their school or campus level strategic plans.

Below please find the anticipated timeline for years one and two of the Academic Remediation Process.

Timeline: Year 1

October 26, 2018: The 2018-2019 SQRP results, Charter School Academic Warning List, and potential school closure were announced. Montessori Englewood was identified as being on the Charter School Warning List, as a result of earning a Level 3 rating. This status officially starts the Charter School Revocation process.

November 2018: Innovation and Incubation (I&I) will schedule a meeting with your school to discuss Revocation. After this meeting, the campus must notify families, financial partners, teachers, and other community stakeholders by November 30, 2018. This notification should explain the process for revocation and activities within the Charter School Academic Remediation Process. CPS is willing to assist the campus in developing effective messaging to ensure that all stakeholders understand what this means for the campus.

December 2018: The attached remediation plan must be submitted to I&I compliance database, EpiCenter. This plan should include the strategies, goals, and steps that your campus has identified for continuous improvement. I&I and/or designee, will review plans for completion and progress monitor implementation of remediation plans.

Winter 2018 and Spring 2019: The campus must implement the remediation plan and provide updates outlined in the attached monitoring timeline. In addition, members of I&I and other CPS staff will conduct school visits.

Anticipated Timeline: Year 2

October 2019: The 2019-2020 SQRP results, Charter School Academic Warning List, and potential school closures announced.

October/November 2019: I&I may schedule a meeting to discuss SQRP ratings and Revocation, if applicable. After this meeting, the campus must notify families, financial partners, teachers, and other community stakeholders that the campus remains on the Charter School Academic Warning List for two consecutive years and is subject to closure, based on criteria defined by the Charter School Quality Policy.

December 2019: The Chicago Board of Education may vote on final revocation decisions. Montessori Englewood and CPS will jointly inform parents of the Board's decisions, what this means for the school, and any related activities and timelines.

The SQRP 2018-2019 summary is attached to this letter. This summary includes the campus's score for each metric and the SQRP points received. The second page of the summary contains a legend that explains the policy's scoring methodology. More information on the CPS SQRP can be found online cps.edu/sqrp and the Charter School Quality Policy can be found within the CPS Policy Handbook.

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If you have any questions about your campus's rating, please contact Zabrina Evans at zmevans2@cps.edu, 773-553-1530 or the Department of School Quality Measurement and Research at sqrp@cps.edu.

I look forward working with you and your school community as you undertake the continued work of school improvement. I know this work at times may be difficult but yet achievable. I also know our common goal of student success and progress is attainable and critical to the lives of our students.

Sincerely,

Mary K. Bradley
Executive Director, Innovation and Incubation

Enclosures
Remediation Plan
Remediation Timeline
Remediation Checklist
Remediation Signature Page
Remediation User Guide
2018 – 2019 SQRP Summary

cc: Rita Nolan, Montessori Englewood Charter School
        Zabrina Evans, Innovation and Incubation

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Meeting Purpose and Goals

2017-2018 Remediation Kick-Off Meeting

- Accountability Status
- Review Academic Warning List PowerPoint Presentation
- Review Remediation Tool and Checklist
- Review Remediation Timeline

Review + Supporting Items

- Remediation Timeline
- Remediation Tool
- Remediation Checklist
- Remediation Signature Page

Next Steps

- Remediation Plan submission December 10, 2018
- Email with meeting goals and reviewed items
- Follow- up, all identified next steps

Action Items	Owner	Deadline

2018-2019

Academic Warning List
Montessori Englewood Charter School

November 1, 2018

2018 - 2019 Remediation Kick-Off Meeting
Agenda

Topic	Outcome	Presenter
Welcome	• Introduction	Mary K. Bradley *Executive Director, Innovation and Incubation*
Charter School Quality Policy	• Charter School Quality Policy • Potential Actions • Projected 2 year timeline • SQRP trend data	Mary K. Bradley *Executive Director, Innovation and Incubation*
Academic Remediation Process	• Remediation process • Remediation timeline • Remediation tool • Remediation completeness check	*Zabrina Evans* *Director, Innovation and Incubation*
Montessori Englewood Short and Long-term Goals	• Key initiatives, goals, and challenges	Mary K. Bradley Executive Director, Innovation and Incubation
Final Thoughts	• Identify follow-ups and next steps	Mary K. Bradley *Executive Director, Innovation and Incubation*

Based on the Charter School Quality Policy, charter schools are placed on the Academic Warning List for the following reasons:

- A Level 3 SQRP rating; **or**
- A two-year SQRP point value average of 2.5 or lower; **or**
- A Level 2 rating in three consecutive years

A charter school campus is listed on the ***Academic Warning List*** when it fails to meet standards per its agreement with CPS.

To ***exit*** the Academic Warning List: a charter school campus must not be rated "Failing to Meet or Make Reasonable Progress" per the agreement; must have a two-year SQRP point value average higher than a 2.6; Level 2+ or higher SQRP rating; must have met goals and successfully implement its remediation plan, and adhere to the remediation timeline and process.

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Charters on the Academic Warning List face the possibility of revocation or not being renewed at the end of their contract.

Revocation

School is Subject to Closure if:
- Failure to implement the remediation plan, or
- Identified on the Warning List for two consecutive years

Non-Renewal

- School is both on the Academic Warning List when its contract is up for renewal and it has a two year SQRP rating of 2.5 or below; **or**
- School was on the Academic Warning List for two years during its contract, and it is not at least a Level 2+ school in the final year of its charter agreement.

Charter School Quality Policy
Projected Revocation and Non-Renewal Timeline

Year 1

Campus performance data from prior year is received and analyzed	Warning List announced; Revocation campuses begin developing/ implementing remediation plans	Remediation plans are submitted to I&I	Submission of Artifacts , Check-Ins, School Site Visits, School Meetings
Summer/Fall	October	December	January – June

Year 2

End of year campus performance data is calculated through Summer Roster/Data Review Process	Warning list announced. Revocation and Non-Renewal decisions proposed	Board decision on revocation and non-renewal	School action executed (if necessary)
Summer	Fall	Fall/Winter	June

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SQRP Metric	Weight	SQRP 15-16	Points (of 5)	SQRP 16-17	Points (of 5)	SQRP 17-18	Points (of 5)	SQRP 18-19	Points (of 5)
National School Growth Percentile NWEA MAP – Reading	18.75%	99th Percentile	5	97th Percentile	5	73rd Percentile	4	1st Percentile	1
National School Growth Percentile NWEA MAP – Math	18.75%	50th Percentile	3	89th Percentile	4	83rd Percentile	4	1st Percentile	1
Percentage of Students Making National Average Growth	10%	65%	3	64.9%	4	55.3%	3	20.8%	1
Growth of African American Students on NWEA MAP – Reading	1.25%	98th Percentile	5	97th Percentile	5	70th Percentile	5	1st Percentile	1
Growth of African American Students on NWEA MAP – Math	1.25%	55th Percentile	4	89th Percentile	5	83rd Percentile	5	1st Percentile	1
Student Attainment on NWEA MAP - Reading (Grades 3-8)	5%	5th Percentile	1	17th Percentile	2	14th Percentile	2	2nd Percentile	1
Student Attainment on NWEA MAP - Math (Grades 3-8)	5%	1st Percentile	1	15th Percentile	2	18th Percentile	2	2nd Percentile	1
Student Attainment on NWEA MAP - Reading (Grade 2)	2.5%	8th Percentile	1	6th Percentile	1	1st Percentile	1	1st Percentile	1
Student Attainment on NWEA MAP - Math (Grade 2)	2.5%	8th Percentile	1	4th Percentile	1	1st Percentile	1	1st Percentile	1
Student Attendance	20%	94.7%	3	95.2%	4	95.1%	4	95%	4
5Essentials Survey	10%	-	-	Not Yet Organized	1	-	-	Not Yet Organized	1
Data Quality	5%	99.8%	5	100%	5	99.5%	5	99.6%	5
Final SQRP Rating		**Level 2+ (Not Applicable)**	**3.4**	**Level 1 (Not Applicable)**	**3.6**	**Level 1 (Not Applicable)**	**3.6**	**Level 3 (Not Applicable)**	**1.8**

Charter School Quality Policy
Warning List and Remediation Process

Academic Warning List: Identified upon release of SQRP ratings.

Remediation Plans: All schools placed on the warning list, in accordance with the School Quality Rating Policy are required to identify goals and implement a plan of school improvement. Quality and completeness review of the remediation plan and artifacts will be provided.

Site Visits: Conducted at all schools identified on the Warning List. Site visits will take place in the Spring.

Parent and board notification: Schools are required to notify parents of its status and provide remediation updates to the Board.

Potential Actions: Schools that do not meet the criteria in the Charter School Quality Policy and are identified for a second time, and/or did not meet their goals and implement their remediation plan, may be recommended for non-renewal, revocation or campus closure.

Review Remediation Handouts

Remediation Process Timeline

Remediation Tool and Supporting Documents

Q/A

Chicago Public Schools

2018-2019
Innovation and Incubation Remediation Plan

Remediation Approval Form
Instructions: Upon submission of the remediation plan, please obtain signatures from the Board Chairman, CEO (if applicable), and School Leader. The signed form denotes that the school governing Board approves the identified SQRP goals, strategies and action steps needed to remediate the school. Submit this form along with the remediation plan to EpiCenter by close of business December 10, 2018.

Chairman Signature
Name:_____
Signature:_____
Date:_____

CEO Signature
Name:_____
Signature:_____
Date:_____

School Leader Signature
Name:_____
Signature:_____
Date:_____

The Office of Innovation and Incubation
2018-2019 Academic Remediation Timeline

Activity	Date
I&I: Academic Warning List Notification Call	October 25, 2018
CPS: Academic Warning List Announced	October 26, 2018
I&I: Academic Remediation Process Kickoff Meeting and Training	Week of November 1 – 6, 2018
School: Upload remediation plan, remediation plan checklist, and remediation signature page to EpiCenter	December 10, 2018
I&I: 1st Check-in @ CPS Purpose of this check-in is to review the following: 1) remediation plan and completeness check; 2) remediation timeline to ensure dates are feasible per school calendar; 3) answer any clarifying questions regarding the process	Week of January 14 – January 18, 2019
School: EpiCenter Uploads Upload the following EpiCenter requirements: 1) an updated remediation plan with Quarters 1+ 2 progress status; 2) Quarters 1 and 2 artifacts (e.g., hyperlinks, artifacts/documentation, etc.); and 3) evidence of parent and Board communication	February 25, 2019
I&I: 2nd Check-in @ school sites	Week of March 11 – March 15, 2019
School: EpiCenter Uploads Upload the following EpiCenter requirements: 1) remediation plan with progress with Quarter 3 status updates; 2) Quarter 3 artifacts (e.g., hyperlinks, artifacts/documentation, etc.); 3) evidence of Board communication and/or progress updates	March 25, 2019
I&I: 3rd Check-in	Week of April 1-5, 2019
I&I: School site visits I&I and/or CPS designees visit schools for observation of remediation plan implementation	Week of April 22 - April 26, 2019
I&I: School meetings I&I to meet with school operators to discuss additional artifacts based on remediation plan and site visit	Week of May 6 – 10, 2019
Schools: EpiCenter Uploads Upload the following EpiCenter requirements: 1) remediation plan with Quarter 4 progress status; 2) final artifacts (e.g., hyperlinks, artifacts/documentation, etc.); 3) evidence of Board communication and/or progress updates to EpiCenter.	June 10, 2019
I&I: School meetings/calls Release of SQRP 2019-2020 results	October/November 2019

Is this component complete (Y/N)	Remediation Plan Components	Comments
☐	The plan has been developed by a *Remediation Plan Development Team that consists of* (6-12 people) that represents <u>all</u> stakeholder groups, including a board president.	
☐	The *Goal Setting* page includes: ☐ SY19 Goals for each SQRP pre-populated metric ☐ Goals are realistic and logically derived. ☐ Evidence of a clear progression ☐ Participation Rate for each SQRP applicable metric	
☐	When SQRP metrics are calculated, the school's goals on the *Goals Setting* page yield a projected SQRP rating and level necessary to meet Exit Criteria 1, 2, and 3 as stated on the *Overview Directions* page.	
☐	The *Strategic Priorities* page identifies 3 or more priority areas for the remainder of the current school year.	
☐	On the *Strategic Priorities* page, each rationale: ☐ Explains both how and why the particular strategy will lead to the desired outcome. ☐ Rationale is supported by data	
☐	On the *Strategic Priorities* page, desired outcomes: ☐ Are SMART: specific, measureable, attainable, relevant, and time bound. ☐ Are aligned with the specific goals set on the previous tabs. ☐ Describe behavioral changes in students, staff, administration, etc.	
☐	On the Strategic Priorities page, progress monitoring components: ☐ Are connected to the *Desired Outcomes* ☐ Describe the type of monitoring ☐ List the frequency of monitoring ☐ Include frequency for how the school's board will progress monitor	
☐	*Action steps* detailed on the *Action Plan* page: ☐ Are specific and directly connected to the Strategic Priorities, Rationales, and Desired Outcomes ☐ Provide a start date and Q1 status ☐ Provide an end date	
☐	*Quarterly Implementation Evidence* detailed on the *Action Plan* page: ☐ Provide a list of artifacts, evidence of implementation ☐ Identify if artifacts can be observed during a walkthrough ☐ Provide detailed information about the artifact in the comment section, along with dates and times to observed	

Is this component complete (Y/N)	Remediation Plan Components	Comments
	Quarterly Implementation Evidence, *Artifacts,* detailed on the *Action Plan* page: ☐ Artifacts labeled appropriately to match the following naming convention (ie. Strategic Priority_action step_name of artifact) ☐ Artifacts are specific and directly connected to the Action Step, Strategic Priorities, Rationales, and Desired Outcomes. ☐ Artifacts provide evidence of how the school's board will progress monitor, along with parent notification	

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Office of Innovation and Incubation

Remediation Plan Template Guide

Spreadsheet Tab Guide:

Use arrows to access additional tabs.

| ◄ ► | Overview_Directions | Goal Setting | Strategic Priorities | NWEA Growth-Action Steps | NWEA A |

"Overview_Directions" Tab:
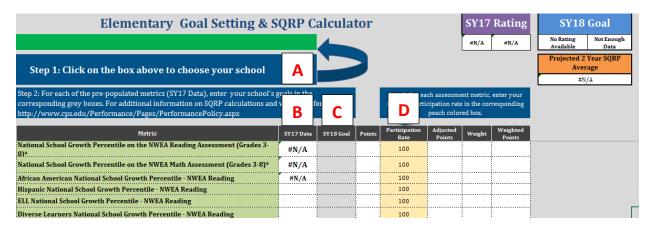
Carefully read the instructions and exit criteria.

- Fill in the names and titles of all members of your remediation team.

"Goal Setting" Tab:

Carefully read the instructions

A. Select your school from the drop down option, if applicable
B. The school's SY18 SQRP data will automatically populate
C. Enter in your goals for the SY19 School Year.
D. If you anticipate you will **not** have 100% of students taking the assessment, adjust the participation rates.

Elementary Goal Setting & SQRP Calculator

	SY17 Rating		SY18 Goal	
	#N/A	#N/A	No Rating Available	Not Enough Data

Step 1: Click on the box above to choose your school **A**

Step 2: For each of the pre-populated metrics (SY17 Data), enter your school's goals in the corresponding grey boxes. For additional information on SQRP calculations and ... refer ... http://www.cps.edu/Performance/Pages/PerformancePolicy.aspx

		Projected 2 Year SQRP Average
		#N/A

... each assessment metric, enter your ... rticipation rate in the corresponding peach colored box.   **D**

B   **C**

Metric	SY17 Data	SY18 Goal	Points	Participation Rate	Adjusted Points	Weight	Weighted Points
National School Growth Percentile on the NWEA Reading Assessment (Grades 3-8)*	#N/A			100			
National School Growth Percentile on the NWEA Math Assessment (Grades 3-8)*	#N/A			100			
African American National School Growth Percentile - NWEA Reading	#N/A			100			
Hispanic National School Growth Percentile - NWEA Reading				100			
ELL National School Growth Percentile - NWEA Reading				100			
Diverse Learners National School Growth Percentile - NWEA Reading				100			

"Strategic Priority" Tab:

Carefully read the instructions

All SQRP Data is pre-populated

A. Enter your mission statement
B. Select 3-5 Priority Areas. Priority Areas correspond to the SQRP metrics.
   - For each priority area you select will have to enter a corresponding Strategy, Rationale, Desired Outcome and Progress Monitoring.
C. Sub Categories are the categories that correspond to the Priority Areas. You are **not** required to select all Sub Categories within a Priority Area.
D. Priority Groups are abbreviated as follows:
   - AA-African Americans
   - H-Hispanics
   - ELL-English Language Learners
   - DL-Diverse Learners
E. Insert an "x" for each "Selected Sub Category"

F. Read the *italicized* description of the following, and enter in information for each selected Priority Area
   - Strategy
   - Rationale
   - Desired Outcome
   - Progress Monitoring

Campus's Remediation Plan - Strategic Priorities

Strategic P

Instruction...   our Mission Statement. Based on data, identify 3-5 Priority Areas that you will focus on until the end of the current school year necessary to meet Exit Criteria 1, 2, and 3 as stated on the Overview Directions page. Then describe your strategy, rationale, desired outcomes...and progress monitoring mechanism for any relevant sub categories. You will complete detailed Action Steps with related information for each Priority Area in separate tabs of this spreadsheet.

Mission Statement

Strategic Priorities

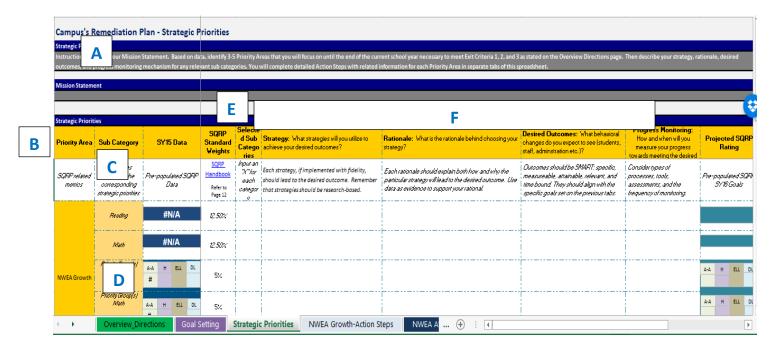| Priority Area	Sub Category	SY 15 Data	SQRP Standard Weights	Selected Sub Categories	Strategy: What strategies will you utilize to achieve your desired outcomes?	Rationale: What is the rationale behind choosing your strategy?	Desired Outcomes: What behavioral changes do you expect to see (students, staff, adminstration etc.)?	Progress Monitoring: How and when will you measure your progress towards meeting the desired	Projected SQRP Rating
SQRP related metrics	...s ...he corresponding strategic priorities	Pre-populated SQRP Data	SQRP Handbook Refer to Page 12	Input an "x" for each category	*Each strategy, if implemented with fidelity, should lead to the desired outcome. Remember that strategies should be research-based.*	*Each rationale should explain both how and why the particular strategy will lead to the desired outcome. Use data as evidence to support your rational.*	*Outcomes should be SMART: specific, measureable, attainable, relevant, and time bound. They should align with the specific goals set on the previous tabs.*	*Consider types of processes, tools, assessments, and the frequency of monitoring.*	Pre-populated SQRP SY 15 Goals
	Reading	#N/A	12.50%						
	Math	#N/A	12.50%						
NWEA Growth	...(...) A-A H ELL DL #		5%						A-A H ELL DL
	Priority Group(s) Math	A-A H ELL DL #	5%						A-A H ELL DL

Overview_Directions | Goal Setting | **Strategic Priorities** | NWEA Growth-Action Steps | NWEA A ... +

Priority Area Tabs (Each tab is named after priority area):

Complete the corresponding Priority Area Tab for each Priority Area you selected.

   A. Enter in Action Steps, these are significant steps that a school must accomplish in the implementation of the strategy.
   B. Responsible Party-enter in the name of an individual or team that will own each action step.
   C. Enter in the Start and Completion Dates
   D. Use the drop-down list to status the progress of the Actions Items for each Quarter

Priority Area Tabs continued – To be completed quarterly

   E. Enter in any School Comments regarding your progress for the action steps. In addition, identify dates and times of when evidence can be observed.
   F. Enter in any Evidence or links to support the implementation of the action steps. Include artifacts of how the board monitor's progress and evidence of parent notification.
   G. Use the drop-down list to select if the action is Observable.

Chicago Public Schools Policy Manual

Title: **CHARTER SCHOOL QUALITY POLICY**
Section: **302.10**
Board Report: 15-1028-PO1   **Date Adopted:** October 28, 2015

Policy:

THE CHIEF EXECUTIVE OFFICER RECOMMENDS:

That the Board adopt a Charter School Quality Policy.

PURPOSE: This policy sets out the charter school academic performance standards which shall be considered when the Board evaluates a charter school's request to expand or replicate. The standards shall also be considered when determining which charter schools are subject to contract revocation or non-renewal for failure to meet or make reasonable progress towards student academic achievement in accordance with Section 27A-9(c)(2) of the Illinois School Code. The academic performance standards set out in this policy utilize the key indicators of performance and the rating designations set out in the Board's School Quality Rating Policy ("SQRP") applicable to all Chicago Public Schools, including charters per the terms of their agreement.

This policy also ensures that (1) there is transparency regarding the expectations and standards for charter school academic performance; and (2) the portfolio of charter schools available to Chicago families and students contains high quality schools.

POLICY TEXT:

I. SCOPE OF POLICY: The charter school performance standards outlined in this policy shall inform the decisions throughout the District's annual charter school evaluation cycle as well as the Board's determinations regarding a charter school's expansion or replication, non-renewal and/or revocation.

II. DEFINITIONS:

Academic Warning List: Refers to the list maintained by the Chief Executive Officer ("CEO") or designee that identifies charter schools or campuses failing to meet or make reasonable progress towards student academic achievement. A charter school or campus shall be placed on the Academic Warning List, if the charter school or campus:

- Has a SQRP rating of Level 3; or
- Has a two-year SQRP point value average of 2.5 or lower; or
- Has a SQRP rating of Level 2 in three consecutive years.

Provided however, the first SQRP rating received by a newly established charter school or campus will not be considered by the CEO or designee to place a school or campus on the Academic Warning List.

If the charter school or campus on the Academic Warning List achieves an SQRP rating of Level 2+ or higher, the school or campus shall be removed from the Academic Warning List, regardless of its two-year SQRP point value average or the number of consecutive years it achieved a Level 2 rating.

Charter school expansion: Refers to adding one or more new grade level outside of the original grade levels approved, or increasing by more than 10% of the total of the authorized student enrollment at any charter school or campus.

Charter school replication: Refers to either (a) increasing the number of authorized school campuses, if the charter is permitted under section 27A-5(b) of the Illinois School Code to operate more than one campus, or (b) increasing the number of single-site charters granted to the same operator.

III.   STANDARDS FOR CHARTER SCHOOL EXPANSION: If a charter school seeks to expand, the CEO will make recommendations to the Board for approval of school expansion based on the following standards:

(A) Charter school operators who operate a single-site charter school will have their applications for expansion recommended to the Board for approval if the school has a current two-year SQRP point value average of 3.2.

(B) Charter school operators who operate two or more charter schools or campuses will have their applications for expansion recommended to the Board for approval if (i) all of the operator's schools or campuses combined have a current two-year SQRP point value average of 3.2 and (ii) the school or campus the operator is seeking to expand is not on the Academic Warning List.

IV.   STANDARDS FOR CHARTER SCHOOL REPLICATION: If a charter school seeks to replicate, the CEO will make recommendations to the Board on school replication based on the following standards:

(A) Charter school operators who operate a single-site charter school will have their applications for replication recommended to the Board for approval if the school has a current two-year SQRP point value average of 3.5.

(B) Charter school operators who operate two or more charter schools or campuses will have their applications for replication recommended to the Board for approval if all of the operator's schools or campuses combined have a current two-year SQRP point value average of 3.2.

V.   STANDARDS FOR NON-RENEWAL: If a charter school seeks to renew its charter school contract, the CEO will make recommendations to the Board on school renewal based on the following standards:

(A) Charter school operators who operate a single-site charter school will be recommended for non-renewal to the Board if the school (i) is on the Academic Warning List during the final year of the charter contract and has a current two-year SQRP point value average rating of 2.5 or below or (ii) was previously on the Academic Warning List for two consecutive or non-consecutive years during its contract, unless the charter school has at least a Level 2+ or higher SQRP rating in the final year of its charter agreement.

(B) Charter school operators who operate two or more charter schools or campuses will have each school or campus evaluated individually for renewal or non-renewal. A school or campus will be recommended for non-renewal to the Board if that charter school or campus is on the Academic Warning List during the final year of the charter contract and has a current two-year SQRP point value average rating of 2.5 or below or (ii) was previously on the Academic Warning list for two consecutive or non-consecutive years during its charter agreement, unless the charter school or campus has at least a Level 2+ or higher SQRP rating in the final year of operation under its charter contract.

VI.   STANDARDS AND PROCESS FOR REVOCATION: When a charter school or campus is placed on the Academic Warning List, the CEO or designee will send notice that the school or campus is in revocation status and subject to closure. Upon receipt of such notice, the charter school or campus shall submit a written remediation plan to the CEO or designee to rectify the problems that resulted in the charter school or campus being placed on the Academic Warning List. The written remediation plan shall include a timeline for implementation and the CEO or designee shall monitor the implementation and adherence to the remediation plan requirements.

The CEO will recommend the revocation of a charter school or campus to the Board if either: (1) the CEO determines that the charter school or campus failed to implement the remediation plan and adhere to the timeline; or (2) the charter school or campus remains on the Academic Warning List for two consecutive years.

VII.   OTHER CONSIDERATIONS: Nothing in this policy prohibits the CEO from making individual recommendations regarding charter school expansion or replication, non-renewal or revocation based on the totality of factors the CEO deems relevant, including but not limited to the quality of the charter school's surrounding schools. Nothing in this policy prohibits the Board from revoking or not renewing a charter for failure to meet generally accepted standards of fiscal management, for failure to comply with applicable law or for committing a material violation of any of the conditions, standards or procedures set forth in their charter school agreement. Nothing in this policy prohibits the Board from making individual determinations regarding charter school expansion or replication, non-renewal or revocation based on the totality of factors the Board deems relevant. In the event the Board adopts a modified SQRP or new school accountability policy, this policy shall apply the modified or new current performance rating level designations found in the modified SQRP or new school accountability policy. In such instances, the CEO or designee shall issue a document that equates the SQRP rating levels in place at the time this policy is adopted with any new rating level designations found in modified SQRP or new school accountability policy.

Amends/Rescinds:
Cross References:
Legal References: 105 ILCS 5/27A-9(c); 105 ILCS 5/27A-5(b)

The Montessori School of Englewood Charter

School ID: 400116 | Network: CHARTER

School Quality Rating: Level 3

2018-2019 Accountability Status: Not Applicable

Previous School Rating(s):
2017-2018: Level 1 (Not Applicable)
2016-2017: Level 1 (Not Applicable)
2015-2016: Level 2+ (Not Applicable)
2014-2015: Level 3 (Not Applicable)

Learn more about the SQRP here: **https://youtu.be/m321Ld0UOVw**

School Quality Rating Indicator	Indicator Score & School Quality Rating Points (of 5 possible)	Indicator Weight (% of total)	Weighted Points
NWEA MAP Growth Indicators—All Students			
National School Growth Percentile – Reading	1st percentile (1 point)	18.75%	0.1875
National School Growth Percentile – Math	1st percentile (1 point)	18.75%	0.1875
% of Students Meeting/Exceeding National Average Growth Norms	20.8 percent (1 point)	10%	0.1
NWEA MAP Growth Indicators—Priority Groups			
African-American Growth Percentile – Reading	1st percentile (1 point)	1.25%	0.0125
Hispanic Growth Percentile – Reading			
English Learner Growth Percentile – Reading			
Diverse Learner Growth Percentile – Reading			
African-American Growth Percentile – Math	1st percentile (1 point)	1.25%	0.0125
Hispanic Growth Percentile – Math			
English Learner Growth Percentile – Math			
Diverse Learner Growth Percentile – Math			
NWEA MAP Attainment Indicators			
National School Attainment Percentile – Reading (Grades 3-8)	2nd percentile (1 point)	5%	0.05
National School Attainment Percentile – Math (Grades 3-8)	2nd percentile (1 point)	5%	0.05
National School Attainment Percentile – Reading (Grade 2)	1st percentile (1 point)	2.5%	0.025
National School Attainment Percentile – Math (Grade 2)	1st percentile (1 point)	2.5%	0.025
Other Indicators			
% of Students Making Sufficient Annual Progress on ACCESS	N/A for all schools		
Average Daily Attendance Rate (Grades K-8)	95 percent (4 points)	20%	0.8
My Voice, My School 5 Essentials Survey	Not Yet Organized (1 point)	10%	0.1
Data Quality Index Score	99.6 percent (5 points)	5%	0.25
		School Quality Rating Total Weighted Points	1.8

Overall Rating Key

Level 1+	Level 1	Level 2+	Level 2	Level 3

SQRP Score Color Coding (all indicators)

5 points	4 points	3 points	2 points	1 point

School Quality Rating Policy (SQRP) Overview

What is the SQRP and what schools does it cover?

The School Quality Rating Policy is the Board of Education's policy for evaluating school performance. Through this policy, each school receives a **School Quality Rating** and an **Accountability Status** every year. Among other things, the SQRP helps to communicate to school stakeholders the academic success of individual schools and the district as a whole; provides a framework for school goal-setting; and guides the Board's decision-making processes around school support and intervention.

All schools receive a rating, including neighborhood schools, magnet schools, charter schools, selective enrollment schools and option schools.

What indicators are included in the SQRP?

Because different schools serve different populations of students, the SQRP uses different indicators for each type of school. The included indicators are as follows:

Elementary Schools	High Schools	Option Schools
- Student attainment on the NWEA MAP test - Student growth on the NWEA MAP test - Student attendance - My Voice, My School survey - Student growth on ACCESS for English Learners - Data quality	- Student attainment on the PSAT/SAT assessments - Student growth on the PSAT/SAT assessments - Student attendance - Graduation rate - Freshman on-track rate - Dropout rate - Students earning early college or career credentials - College enrollment and persistence - My Voice, My School survey - Data quality	- Student growth on the STAR test - Graduation rate - Enrollment stabilization - Student attendance - Credit attainment

How is a school's rating calculated?

For each of the indicators above, a school can score between one and five points. The indicator scores are then averaged (some indicators are weighted higher than others in this average). The weighted average – which will also fall between one and five points – is then used to determine a school's rating and status based on the table below.

Overall Score		Minimum Attainment Percentile	School Quality Rating	Accountability Status
4.0 or more		90th	Level 1+	Good Standing
Between 3.5 and 3.9	**OR**	70th	Level 1	Good Standing
Between 3.0 and 3.4		50th	Level 2+	Good Standing
Between 2.0 and 2.9		40th	Level 2	Provisional Support
Less than 2.0		--	Level 3	Intensive Support

School Quality Rating Policy (SQRP) Overview

What does the school's rating mean?

- **Level 1+** is the highest performance – this is a nationally competitive school with the opportunity to share best practices with others
- **Level 1** is high performance – this is a good school choice with many positive qualities. Minimal support is needed
- **Level 2+** is average performance – Additional support from the network team is needed to implement interventions.
- **Level 2 i**s below average performance. The "provisional support" status requires increased support from the network.
- **Level 3** is the lowest performance; school is in need of "intensive intervention" directed by the district. Charter schools in this category are on Academic Warning List

What does a school's status mean?

A school's status determines who has decision-making power at the school level.

- **Good Standing** is a school that has met or exceeded the district's minimum performance standards. These schools must follow district policies and mandates, but the LSC retains all normal autonomy.
- **Provisional Support** means that the school needs increased support. The network and CEO may require the school to revise its Continuous Improvement Work Plan (CIWP) and/or budget and may require specific professional development.
- **Intensive Support** means the school needs a high level of support. In addition to the interventions listed for Provisional Support, the Board of Education may – in extreme cases – take actions such as a turnaround or principal removal. These actions will not happen in all Intensive Support schools and require a public hearing.

What is the difference between attainment and growth? Which matters more?

Both attainment and growth measure a school's performance compared to other schools **nationwide.**

Attainment measures performance at a **single point in time** compared to schools nationally. So if a school's *attainment* is in the 85th percentile, that means the school had higher scores than 85 percent of the schools **who took the test at the same time**.

Growth measures performance **from one year to the next.** It evaluates a school's performance based on how much growth occurred compared to other schools nationally with the same pretest score. So if a school's *growth* is in the 85th percentile, that means the school showed more growth than 85 percent of the schools **who started at the same place the previous year**.

Both attainment and growth matter, but growth is weighted more in the SQRP. That is because schools start in different places, and growth takes that into consideration. Attainment is a good indicator of how ready students are for their next step (high school, college, careers). Growth is a good indicator of how much they are learning, and therefore how effective the school is at providing instruction.

Where can I find more information?

Principals, school offices and network offices are always great resources for more information. General information on SQRP can be found at cps.edu/sqrp and school-specific information is available on school profile pages (cps.edu/findaschool). The Department of School Quality Measurement is also available at 773-553-4444.

Exhibit B

SQRP Points: 1 2 3 4 5 **Citywide Median:** ● **Year** 2017-18 **Level**

Elementary **School** MONTESSORI ENGLEWOOD

Metric Category	Year	Metric (group)	Progress toward next cutpoint	Value	SQRP Points	Particip. Rate	Weight	City Median
NWEA MAP Growth Indicators - All Students		National School Growth Percentile - Reading		1.0	1.00	96.00	18.75	61.00
		National School Growth Percentile - Math		1.0	1.00	98.00	18.75	61.00
		Percent of Students Meeting/Exceeding National Average Growth Norms		20.8	1.00	97.00	10.00	56.65
NWEA MAP Growth Indicators - Priority Groups		African-American Growth Percentile - Reading		1.0	1.00	96.00	1.25	54.00
		African-American Growth Percentile - Math		1.0	1.00	98.00	1.25	50.00
NWEA MAP Attainment Indicators		National School Attainment %ile - Reading (Grade 2)		1.0	1.00	97.00	2.50	47.00
		National School Attainment %ile - Reading (Grades 3-8)		2.0	1.00	96.00	5.00	57.00
		National School Attainment %ile - Math (Grade 2)		1.0	1.00	95.00	2.50	42.00
		National School Attainment %ile - Math (Grades 3-8)		2.0	1.00	98.00	5.00	50.50
Other Indicators		Average Daily Attendance Rate		95.0	4.00		20.00	95.70
		My Voice, My School 5 Essentials Survey		1.0	1.00		10.00	4.00
		Data Quality Index Score		99.6	5.00		5.00	99.80

2015 2017

FOCUS STRATEGIC PARTNERS

focusstrategicpartners.com

The above charts display the progress toward a given cutpoint (bar length) and the number of SQRP points earned (color) for each given metric. The vertical bars on the left indicate results over several years. The horizontal bars represent the year in question, with the weight of the metric indicated by the bar thickness. The dots on the horizontal chart indicate the citywide median score for the given metric.

Overall Results

Level 3	Level 2+	Level 1	Level 1	Level 3
2014	2015	2016	2017	2018
1.6	3.4	3.6	3.6	1.8

NWEA MAP Achievement Summary

Point-in-Time Overview

Percentile of the Average Student

Mathematics

24

Reading

24

Percentile of the Average Student	
Percentile Range (Box Plot)	

0   25   50   75   100   0   25   50   75   100

Cumulative Percent of Students by Percentile (KAI Value)

Mathematics

KAI Value

-40.1

■ Cumulative Percent of Students
■ National Distribution

KAI Value

-37.0

Reading

0   50   100
Percentile

The KAI (Kaufman Academic Index) chart displays the cumulative percent of students at or below a given percentile. The KAI value measures the difference between the national distribution (five percent at or below the fifth percentile, ten percent at or below the tenth percentile, etc.) and the distribution of the given school/district. Positive values reflect schools/districts outperforming the national distribution and negative values reflect schools/districts underperforming the national distribution. The range is from -100 to +100.

0   50   100
Percentile

Scatterplot

NOTES

* The data analyzed include all valid test scores for the given term that are flagged as eligible for growth measures. Each student has only one test counted per type of test per term. Groups consisting of fewer than ten students are not reported in order to maintain student privacy.

* The percentile of the average student is calculated by averaging relative ability scores (normal curve equivalents) for the group and converting the result to a percentile. It represents an approximation of the percent of students in the national distribution who scored lower than the average student in the given group. The box displays the range for the middle fifty percent of students.

* The scatterplot to the left displays individual students' percentiles in reading (x-axis) and mathematics (y-axis). Dots may overlap; darker areas indicate more overlapping students. Use this chart to determine whether there are pockets of students performing well in one subject and not in the other.

NWEA MAP Achievement Summary

Subcategory Breakdown

Interpretation Guide

Percentile of the Average Student for the Given Group	
Percentile Range (Box Plot)	25　　50　　75

The percentile of the average student is calculated by averaging relative ability scores for the group and converting the result to a percentile. It represents an approximation of the percent of students in the national distribution who scored lower than the average student in the given group. The national average should be 50.

The box plot displays the range of percentiles received by the middle fifty percent of the given group in the box. The whiskers extend to the minimum and maximum values for that group. In the national distribution, the middle box ranges from 25 to 75, with the median at 50, and the whiskers extend to the ends of the scale.

Percentile of the Average Student and Percentile Ranges

TermName / Subject
Spring 2016-2017

School	Category	Subcategory	Mathematics	Reading
All Schools	Overall	Overall	24	24
	Grade	1	13	11
		2	15	14
		3	29	32
		4	38	39
		5	20	23
		6	39	37
	Other Groups	Not Tested Next Fall	23	30
		SPED 2017-2018	13	7
	Gender	F	27	31
		M	21	19
	Race/Ethnicity	Black or African American	24	24
	Class	200	15	18
		201	33	28
		208	13	10
		212	21	24
		300	31	19
		301	39	44
		312	21	35

Percentile　　　　Percentile

NWEA MAP Achievement Summary

NWEA Subscores Breakdown

Percent of Students by Performance on NWEA Subscores

Adjective: ■ High ■ HiAvg ■ Avg ■ LoAvg ■ Low

Subject / Measure

School	Category	Subcategory	Mathematics						Reading						
			Number and Operations	Measurement and Data	Geometry	Operations and Algebraic Thinking	The Real and Complex Number Systems	Statistics and Probability	Foundational Skills	Language and Writing	Literature and Informational	Vocabulary Use and Functions	Informational Text	Literature	Vocabulary Acquisition and Use
All Schools	Overall	Overall	13% / 18% / 55%	18% / 21% / 45%	14% / 19% / 17% / 39%	15% / 25% / 43%	21% / 14% / 21% / 36%	14% / 14% / 29% / 14% / 29%	26% / 60%	29% / 63%	14% / 71%	17% / 71%	16% / 20% / 15% / 42%	15% / 16% / 24% / 37%	12% / 16% / 15% / 20% / 38%

Subject / Measure

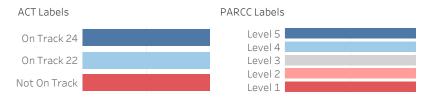| School	Category	Subcategory	Mathematics						Reading						
			Number and Operations	Measurement and Data	Geometry	Operations and Algebraic Thinking	The Real and Complex Number Systems	Statistics and Probability	Foundational Skills	Language and Writing	Literature and Informational	Vocabulary Use and Functions	Informational Text	Literature	Vocabulary Acquisition and Use
All Schools	Grade	1	59%	63%	66%	34% / 47%			62%	29% / 65%	74%	74%			
		2	70%	55%	45%	61%							59%	59%	59%
		3	55%	45%		29%							34%	29%	34%
		4	38%		29%	35%							37%	26%	29%
		5	56%	44%	44%	52%							44%	33% / 41%	33% / 33%
		6			29% / 29%	29% / 36%	36%	29% / 29%					29%	29%	29%

NWEA MAP Achievement Summary
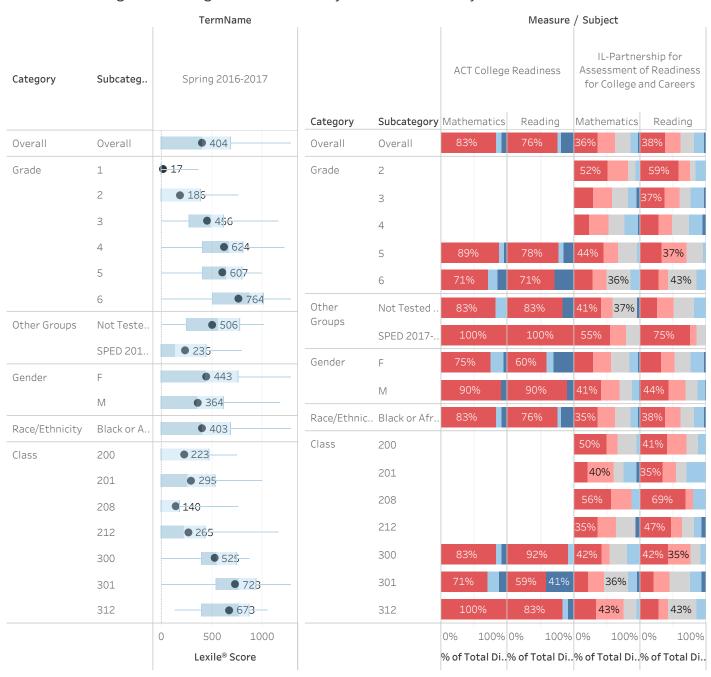
Lexile® and Projected Proficiency

The Montessori School of Englewood
Spring 2016-2017

Note: Lexile® scores of "BR" or "Beginning Reader" have been classified as zeroes for the purpose of averaging and displaying scores. Use caution in interpreting cross-grade-level groups, as differences in the numbers of students from each grade level could contribute to group differences.
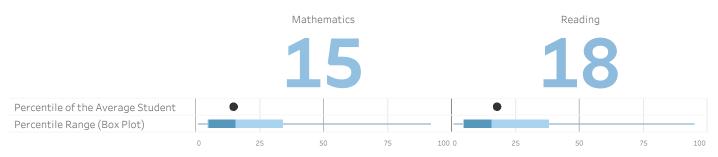
ACT Labels

- On Track 24
- On Track 22
- Not On Track

PARCC Labels

- Level 5
- Level 4
- Level 3
- Level 2
- Level 1

Lexile® Average and Range

TermName

Category	Subcateg..	Spring 2016-2017
Overall	Overall	404
Grade	1	17
	2	186
	3	456
	4	624
	5	607
	6	764
Other Groups	Not Teste..	506
	SPED 201..	235
Gender	F	443
	M	364
Race/Ethnicity	Black or A..	403
Class	200	223
	201	295
	208	140
	212	265
	300	525
	301	723
	312	673

Lexile® Score (0 500 1000)

Projected Proficiency

Measure / Subject

Category	Subcategory	ACT College Readiness — Mathematics	ACT College Readiness — Reading	IL-Partnership for Assessment of Readiness for College and Careers — Mathematics	IL-Partnership for Assessment of Readiness for College and Careers — Reading
Overall	Overall	83%	76%	36%	38%
Grade	2			52%	59%
	3				37%
	4				
	5	89%	78%	44%	37%
	6	71%	71%	36%	43%
Other Groups	Not Tested ..	83%	83%	41% 37%	
	SPED 2017-..	100%	100%	55%	75%
Gender	F	75%	60%		
	M	90%	90%	41%	44%
Race/Ethnic..	Black or Afr..	83%	76%	35%	38%
Class	200			50%	41%
	201			40%	35%
	208			56%	69%
	212			35%	47%
	300	83%	92%	42%	42% 35%
	301	71%	59% 41%	36%	
	312	100%	83%	43%	43%

% of Total Di.. (0% 100%)

Lexile® is a trademark of MetaMetrics, Inc., and is registered in the United States and abroad.

NWEA MAP Achievement Summary

Point-in-Time Overview

Percentile of the Average Student

	Mathematics	Reading
	15	**18**

Percentile of the Average Student	
Percentile Range (Box Plot)	

0   25   50   75   100   0   25   50   75   100

Cumulative Percent of Students by Percentile (KAI Value)

Mathematics	KAI Value	KAI Value	Reading

-57.4

■ Cumulative Percent of Students
■ National Distribution

-51.0

The KAI (Kaufman Academic Index) chart displays the cumulative percent of students at or below a given percentile. The KAI value measures the difference between the national distribution (five percent at or below the fifth percentile, ten percent at or below the tenth percentile, etc.) and the distribution of the given school/district. Positive values reflect schools/districts outperforming the national distribution and negative values reflect schools/districts underperforming the national distribution. The range is from -100 to +100.

Percentile

Percentile

Scatterplot

Math Percentile

Reading Percentile

NOTES

* The data analyzed include all valid test scores for the given term that are flagged as eligible for growth measures. Each student has only one test counted per type of test per term. Groups consisting of fewer than ten students are not reported in order to maintain student privacy.

* The percentile of the average student is calculated by averaging relative ability scores (normal curve equivalents) for the group and converting the result to a percentile. It represents an approximation of the percent of students in the national distribution who scored lower than the average student in the given group. The box displays the range for the middle fifty percent of students.

* The scatterplot to the left displays individual students' percentiles in reading (x-axis) and mathematics (y-axis). Dots may overlap; darker areas indicate more overlapping students. Use this chart to determine whether there are pockets of students performing well in one subject and not in the other.

NWEA MAP Achievement Summary

Subcategory Breakdown

Interpretation Guide

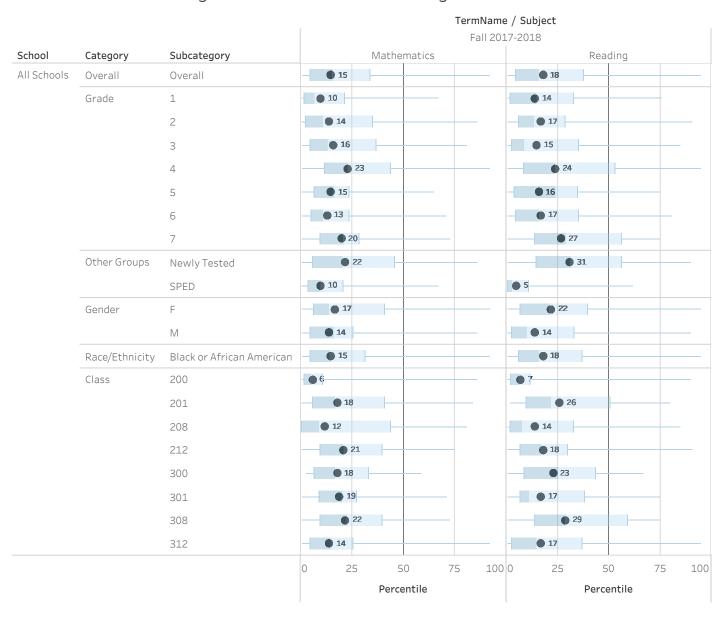|	
Percentile of the Average Student for the Given Group	
Percentile Range (Box Plot)	25 50 75

The percentile of the average student is calculated by averaging relative ability scores for the group and converting the result to a percentile. It represents an approximation of the percent of students in the national distribution who scored lower than the average student in the given group. The national average should be 50.

The box plot displays the range of percentiles received by the middle fifty percent of the given group in the box. The whiskers extend to the minimum and maximum values for that group. In the national distribution, the middle box ranges from 25 to 75, with the median at 50, and the whiskers extend to the ends of the scale.

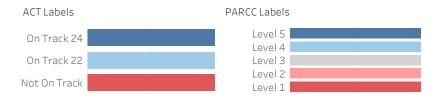## Percentile of the Average Student and Percentile Ranges

TermName / Subject

Fall 2017-2018

School	Category	Subcategory	Mathematics	Reading
All Schools	Overall	Overall	15	18
	Grade	1	10	14
		2	14	17
		3	16	15
		4	23	24
		5	15	16
		6	13	17
		7	20	27
	Other Groups	Newly Tested	22	31
		SPED	10	5
	Gender	F	17	22
		M	14	14
	Race/Ethnicity	Black or African American	15	18
	Class	200	6	7
		201	18	26
		208	12	14
		212	21	18
		300	18	23
		301	19	17
		308	22	29
		312	14	17

Percentile
Percentile

NWEA MAP Achievement Summary

NWEA Subscores Breakdown

Percent of Students by Performance on NWEA Subscores

Adjective: ■ High ■ HiAvg ■ Avg ■ LoAvg ■ Low

Subject / Measure

School	Category	Subcategory	Mathematics						Reading						
			Number and Operations	Measurement and Data	Geometry	Operations and Algebraic Thinking	The Real and Complex Number Systems	Statistics and Probability	Foundational Skills	Language and Writing	Literature and Informational	Vocabulary Use and Functions	Informational Text	Literature	Vocabulary Acquisition and Use
All Schools	Overall	Overall	60% / 21%	57% / 23% / 16%	55% / 23%	54% / 23% / 11%	53% / 23% / 12% / 12%	63% / 21% / 14%	56% / 19% / 19%	63% / 15%	56% / 19% / 15%	70% / 22%	56% / 21%	56% / 18% / 12%	55% / 15% / 15%

Subject / Measure

School	Category	Subcategory	Mathematics						Reading						
			Number and Operations	Measurement and Data	Geometry	Operations and Algebraic Thinking	The Real and Complex Number Systems	Statistics and Probability	Foundational Skills	Language and Writing	Literature and Informational	Vocabulary Use and Functions	Informational Text	Literature	Vocabulary Acquisition and Use
All Schools	Grade	1	63%	63%	70%	59%			58%	65%	58%	73%			
		2	63%	51%	49%	66%							67%	64%	61%
		3	65%	50%	56%	56%							66%	63%	66%
		4	47%	50%	43%	37%							50%	46%	43%
		5	64%	70%	52%	52% / 36%							55%	58%	55%
		6			67%	63%	67%	70%					56%	52%	59%
		7			53%	40% / 40%	40% / 33%	53%					33%	47%	40%

NWEA MAP Achievement Summary

Lexile® and Projected Proficiency

Note: Lexile® scores of "BR" or "Beginning Reader" have been classified as zeroes for the purpose of averaging and displaying scores. Use caution in interpreting cross-grade-level groups, as differences in the numbers of students from each grade level could contribute to group differences.

ACT Labels

On Track 24	████
On Track 22	████
Not On Track	████

PARCC Labels

Level 5	████
Level 4	████
Level 3	████
Level 2	████
Level 1	████

Lexile® Average and Range

TermName

Category	Subcateg..	Fall 2017-2018
Overall	Overall	289
Grade	1	0
	2	57
	3	158
	4	387
	5	419
	6	520
	7	671
Other Groups	Newly Tes..	438
	SPED	207
Gender	F	324
	M	249
Race/Ethnicity	Black or A..	288
Class	200	26
	201	117
	208	76
	212	82
	300	479
	301	433
	308	687
	312	414

Lexile® Score (0, 500, 1000)

Projected Proficiency

Measure / Subject

Category	Subcategory	ACT College Readiness — Mathematics	ACT College Readiness — Reading	IL-Partnership for Assessment of Readiness for College and Careers — Mathematics	IL-Partnership for Assessment of Readiness for College and Careers — Reading
Overall	Overall	96%	88%	42% 36%	49%
Grade	2			49%	62%
	3			47%	63%
	4			43%	39%
	5	97%	91%	36% 52%	45% 42%
	6	96%	93%	59%	44%
	7	93%	73%	47%	40%
Other Groups	Newly Test..	92%	75%	40%	38%
	SPED	100%	100%	52% 39%	81%
Gender	F	95%	88%	43% 33%	40% 35%
	M	97%	89%	42% 39%	61%
Race/Ethnic..	Black or Afr..	96%	88%	43% 36%	49%
Class	200			73%	93%
	201				36%
	208			57%	60%
	212			44%	61%
	300	100%	88%	41% 41%	42%
	301	91%	91%	48%	52%
	308	94%	75%	44%	44%
	312	100%	95%	47% 38%	45% 35%

% of Total Di.. / % of Total Di.. / % of Total Di.. / % of Total Di..

NWEA MAP Growth Summary

Growth Overview

Percent Increasing Percentile

Mathematics
31%

Reading
34%

A percentile represents the percent of students in the sample who scored lower than the student in question. The percent of students increasing their percentiles is an indicator of the **breadth** of growth across students who were present for both the start and end tests. A number above fifty percent (50%) indicates a class in which most students are advancing faster than their peers nationwide.

Change in Normal Curve Equivalent

Mathematics
-7.0

Reading
-5.3

The change in normal curve equivalent (NCE) is an indicator of the **amount** of growth across students who took both tests. NCEs represent relative student ability scores on a scale from 1 to 99 and can be averaged and compared. A student who grows at an typical level will have a change in NCE of around zero. A positive number on this measure indicates that students are growing faster than their peers nationwide.

Percentile of the Average Student
for Start Season(s) and Fall 17-18 (End)

Mathematics

Reading

Start Season 24

End Season 15

Start Season 24

End Season 17

0   25   50   75   100   0   25   50   75   100

The percentile of the average student represents the rough percentage of students across the country who scored lower than the average student in the cohort we are examining. If the whole cohort of students is improving relative to their peers we should see this number increase from the start to the end season. A decrease means that students are losing ground compared to their peers.

Student Percentile Scatterplots

Mathematics

Reading

The scatterplots above display students' percentiles from the start season (x-axis) and Fall 17-18 (y-axis). The size of the bubble represents the number of students with that pairing of start and end percentiles. Overlapping bubbles are colored darker. Bubbles above a 45 degree line represent improvement and those below represent decline.

Notes

* Up to two start seasons may be listed above. The student's start score is taken from the first season listed, if available, and from the second season if not. If only one start season is listed, then that is the season used.

* All numbers in this report are controlled for turnover, meaning that only students with scores in both a start and end season are included.

* The data analyzed include all valid test scores for the given terms that are flagged as eligible for growth measures. Each student has only one test counted per type of test for the start season and one for the end season.

* Groups consisting of fewer than ten students are not reported in order to maintain student privacy.

NWEA MAP Growth Summary

% Increasing %ile and NCE Change Subgroups

The Montessori School of Englewood

Spring 16-17 to Fall 17-18
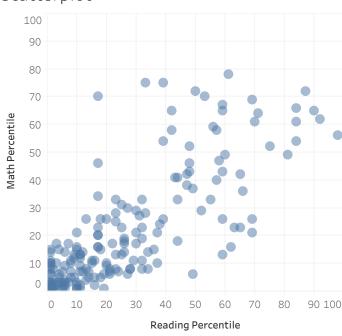
Percent Increasing Percentile

School	Category	Subcategory	Mathematics	Reading
All Schools	Overall	Overall	31%	34%
	Class	300	25%	35%
		301	23%	15%
		308	25%	25%
		312	10%	23%
		200	38%	50%
		212	69%	64%
		201	58%	42%
		208	39%	50%
	Gender	F	30%	35%
		M	32%	33%
	Grade	2	39%	63%
		3	61%	41%
		4	24%	25%
		5	7%	21%
		6	26%	26%
		7	25%	25%
	Race/Ethnicity	Black or African American	29%	35%
	Other Groups	SPED	33%	35%
	Starting Quartile	Bottom (<=25)	46%	48%
		Second (51-75)	12%	18%
		Third (26-50)	25%	26%
		Top (>=76)	0%	8%

Change in Normal Curve Equivalent
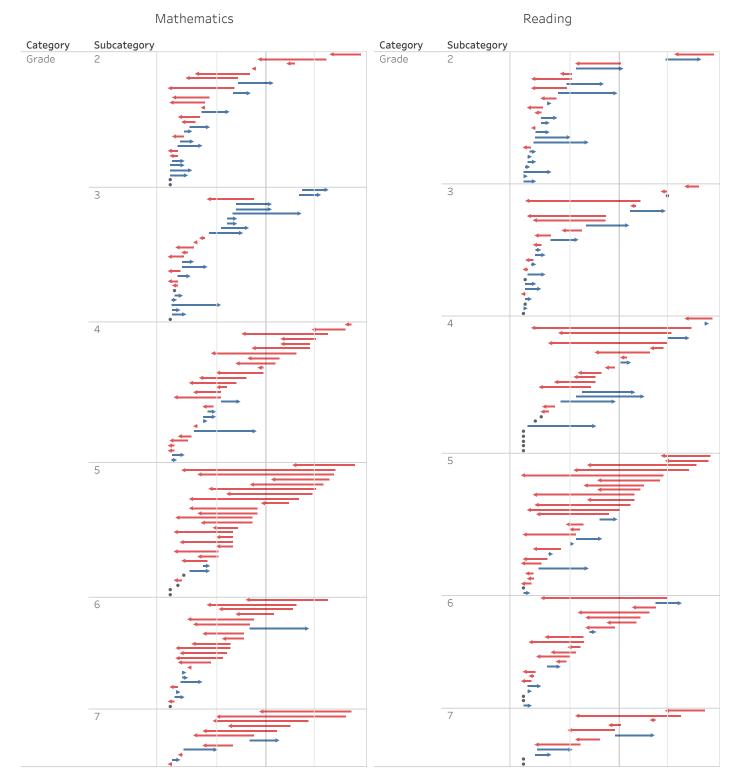
School	Category	Subcategory	Mathematics	Reading
All Schools	Overall	Overall	-7.0	-5.3
	Class	300	-9.0	-1.4
		301	-8.8	-14.5
		308	-12.2	-4.8
		312	-14.0	-10.1
		200	-3.2	-5.8
		212	5.5	1.6
		201	-0.4	-1.7
		208	-2.5	4.8
	Gender	F	-8.5	-6.0
		M	-5.2	-4.4
	Grade	2	-3.5	2.4
		3	2.8	-2.1
		4	-6.9	-4.6
		5	-16.1	-15.4
		6	-9.3	-6.6
		7	-12.2	-4.8
	Race/Ethnicity	Black or African American	-7.3	-5.4
	Other Groups	SPED	-3.4	-2.3
	Starting Quartile	Bottom (<=25)	0.6	2.0
		Second (51-75)	-14.1	-12.6
		Third (26-50)	-9.9	-8.2
		Top (>=76)	-26.3	-26.3
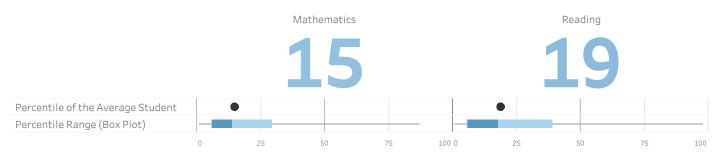
NWEA MAP Growth Summary

Arrow Map of Percentile Change

The below charts display each student's change in national percentile ranking from Spring 16-17 to Fall 17-18. Within each subcategory and subject, students are listed in order of their starting percentile. The color and the direction of the arrow indicate the direction of change. Circles represent students whose percentile did not change.

Mathematics

Category	Subcategory
Grade	2
	3
	4
	5
	6
	7

Reading

Category	Subcategory
Grade	2
	3
	4
	5
	6
	7

Prepared by Seth Kaufman

NWEA MAP Achievement Summary
Point-in-Time Overview

Percentile of the Average Student

	Mathematics	Reading
	15	**19**

Percentile of the Average Student	
Percentile Range (Box Plot)	

Cumulative Percent of Students by Percentile (KAI Value)

Mathematics

KAI Value

-57.9
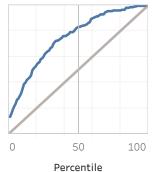
■ Cumulative Percent of Students
■ National Distribution

The KAI (Kaufman Academic Index) chart displays the cumulative percent of students at or below a given percentile. The KAI value measures the difference between the national distribution (five percent at or below the fifth percentile, ten percent at or below the tenth percentile, etc.) and the distribution of the given school/district. Positive values reflect schools/districts outperforming the national distribution and negative values reflect schools/districts underperforming the national distribution. The range is from -100 to +100.

KAI Value

-49.9

Reading

Percentile

Percentile

Scatterplot

Math Percentile

Reading Percentile

NOTES

* The data analyzed include all valid test scores for the given term that are flagged as eligible for growth measures. Each student has only one test counted per type of test per term. Groups consisting of fewer than ten students are not reported in order to maintain student privacy.

* The percentile of the average student is calculated by averaging relative ability scores (normal curve equivalents) for the group and converting the result to a percentile. It represents an approximation of the percent of students in the national distribution who scored lower than the average student in the given group. The box displays the range for the middle fifty percent of students.

* The scatterplot to the left displays individual students' percentiles in reading (x-axis) and mathematics (y-axis). Dots may overlap; darker areas indicate more overlapping students. Use this chart to determine whether there are pockets of students performing well in one subject and not in the other.

Prepared by Seth Kaufman

NWEA MAP Achievement Summary

Subcategory Breakdown

Interpretation Guide

Percentile of the Average Student for the Given Group		
Percentile Range (Box Plot)	25 50 75	

The percentile of the average student is calculated by averaging relative ability scores for the group and converting the result to a percentile. It represents an approximation of the percent of students in the national distribution who scored lower than the average student in the given group. The national average should be 50.

The box plot displays the range of percentiles received by the middle fifty percent of the given group in the box. The whiskers extend to the minimum and maximum values for that group. In the national distribution, the middle box ranges from 25 to 75, with the median at 50, and the whiskers extend to the ends of the scale.

Percentile of the Average Student and Percentile Ranges

School	Category	Subcategory	Mathematics	Reading
All Schools	Overall	Overall	15	19
	Grade	1	18	15
		2	19	21
		3	14	18
		4	12	15
		5	21	26
		6	13	16
		7	14	22
		8	18	24
	Other Groups	w/ Accom.	5	4
	Gender	F	17	26
		M	13	12
	Race/Ethnicity	Black or African American	15	19
	Class	200	14	22
		201	15	14
		208	11	7
		212	26	28
		300	13	15
		301	14	15
		302	18	25
		308	16	26
		312	13	18

TermName / Subject
Fall 2018-2019

NWEA MAP Achievement Summary

NWEA Subscores Breakdown

The Montessori School of Englewood
Fall 2018-2019

Percent of Students by Performance on NWEA Subscores

Adjective: ■ High ■ HiAvg ■ Avg ■ LoAvg ■ Low ■

Subject / Measure

Category	Subcat..	Mathematics						Reading								
		Number and Operations	Measurement and Data	Geometry	Operations and Algebraic Thinking	The Real and Complex Number Systems	Statistics and Probability	Foundational Skills	Language and Writing	Vocabulary Use and Functions	Literature and Informational Text	Informational Text: Key Ideas and Details	Informational Text: Language, Craft, an..	Literary Text: Key Ideas and Details	Literary Text: Language, Craft, an..	Vocabulary: Acquisition and Use
Overall	Overall	18%/17%/59%	12%/24%/57%	12%/22%/54%	11%/20%/57%	21%/61%	21%/67%	25%/54%	14%/21%/57%	68%	29%/50%	13%/27%/47%	14%/32%/43%	13%/25%/44%	27%/50%	24%/53%

Subject / Measure

Category	Subcat..	Mathematics						Reading								
		Number and Operations	Measurement and Data	Geometry	Operations and Algebraic Thinking	The Real and Complex Number Systems	Statistics and Probability	Foundational Skills	Language and Writing	Vocabulary Use and Functions	Literature and Informational Text	Informational Text: Key Ideas and Details	Informational Text: Language, Craft, an..	Literary Text: Key Ideas and Details	Literary Text: Language, Craft, an..	Vocabulary: Acquisition and Use
Grade	1	47%	57%	57%	37%			54%	57%	68%	50%					
	2	55%	50%	50%	50%							43%	52%	52%	39%/43%	57%
	3	70%	63%	43%	67%							50%	54%	39%	57%	50%
	4	71%	61%	57%	64%							65%	58%	50%	65%	50%
	5	48%	52%	57%	43%								43%		43%	62%
	6			63%	69%	66%	75%					52%	39%/42%	48%	58%	36%/52%
	7			61%	65%	61%	61%					35%	43%	39%	43%	57%
	8			50%	58%	50%	58%					42%		50%	42%/42%	42%

NWEA MAP Achievement Summary

Lexile® and Projected Proficiency

Note: Lexile® scores of "BR" or "Beginning Reader" have been classified as zeroes for the purpose of averaging and displaying scores. Use caution in interpreting cross-grade-level groups, as differences in the numbers of students from each grade level could contribute to group differences.

ACT Labels

On Track 24	███████████
On Track 22	███████████
Not On Track	███████████

IL-Partnership for Assessment of Readiness for College and Careers

Level 5	███████████
Level 4	███████████
Level 3	███████████
Level 2	███████████
Level 1	███████████

Lexile® Average and Range

TermName

Category	Subcategory	Fall 2018-2019
Overall	Overall	366
Grade	1	1
	2	64
	3	193
	4	325
	5	578
	6	567
	7	708
	8	765
Other Groups	w/ Accom.	274
Gender	F	443
	M	282
Race/Ethnicity	Black or Afr..	371
Class	200	86
	201	73
	208	44
	212	124
	300	445
	301	463
	302	725
	308	758
	312	460

0   500   1000
Lexile® Score

Projected Proficiency

Measure / Subject

		IL-Partnership for Assessment of Readiness for College and Careers		SAT	
Category	Subcategory	Mathematics	Reading	Mathematics	Reading
Overall	Overall	51% 31%	48% 31%	94%	83%
Grade	2	41%	57%		
	3	50% 33%	50%		
	4	54%	54%		
	5	43% 29%	43%	86%	71%
	6	58% 33%	39% 52%	97%	91%
	7	61%	61%	96%	78%
	8	67%	50% 42%	100%	92%
Other Grou..	w/ Accom.	81%	93%	100%	100%
Gender	F	46% 32%	34% 35%	94%	75%
	M	56% 31%	64%	95%	93%
Race/Ethnic..	Black or Afr..	51% 31%	47% 31%	94%	83%
Class	200	69%	63%		
	201	36% 36%	33% 44%		
	208	67%	70%		
	212	44%	44% 38%		
	300	62%	36% 44%	94%	88%
	301	46% 31%	56%	94%	82%
	302	55% 30%	45%	90%	75%
	308	52% 35%	48% 39%	100%	87%
	312	50% 41%	45% 32%	91%	83%

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NWEA MAP Growth Summary

Growth Overview

Percent Increasing Percentile

Mathematics	Reading
43%	**54%**

A percentile represents the percent of students in the sample who scored lower than the student in question. The percent of students increasing their percentiles is an indicator of the **breadth** of growth across students who were present for both the start and end tests. A number above fifty percent (50%) indicates a class in which most students are advancing faster than their peers nationwide.

Change in Normal Curve Equivalent

Mathematics	Reading
-1.3	**3.6**

The change in normal curve equivalent (NCE) is an indicator of the **amount** of growth across students who took both tests. NCEs represent relative student ability scores on a scale from 1 to 99 and can be averaged and compared. A student who grows at an typical level will have a change in NCE of around zero. A positive number on this measure indicates that students are growing faster than their peers nationwide.
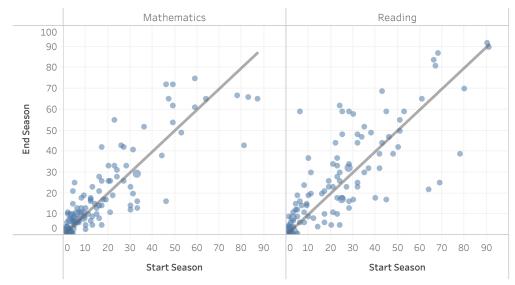
Percentile of the Average Student
for Start Season(s) and Fall 18-19 (End)

	Mathematics	Reading
Start Season	14	14
End Season	13	18

The percentile of the average student represents the rough percentage of students across the country who scored lower than the average student in the cohort we are examining. If the whole cohort of students is improving relative to their peers we should see this number increase from the start to the end season. A decrease means that students are losing ground compared to their peers.

Student Percentile Scatterplots

The scatterplots above display students' percentiles from the start season (x-axis) and Fall 18-19 (y-axis). The size of the bubble represents the number of students with that pairing of start and end percentiles. Overlapping bubbles are colored darker. Bubbles above a 45 degree line represent improvement and those below represent decline.
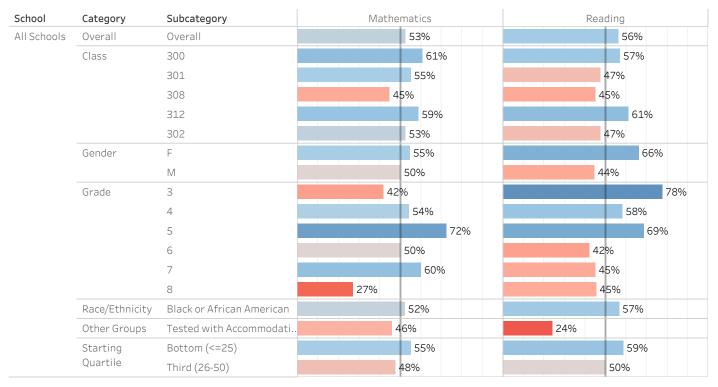
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Prepared by Seth Kaufman

NWEA MAP Growth Summary

% Increasing %ile and NCE Change Subgroups

Percent Increasing Percentile

School	Category	Subcategory	Mathematics	Reading
All Schools	Overall	Overall	43%	54%
	Class	300	33%	56%
		301	25%	50%
		308	55%	40%
		312	42%	60%
		200	64%	70%
		212	36%	64%
		302	68%	53%
	Gender	F	50%	65%
		M	36%	43%
	Grade	2	50%	71%
		3	32%	56%
		4	22%	50%
		5	39%	65%
		6	48%	44%
		7	70%	50%
		8	45%	55%
	Race/Ethnicity	Black or African American	44%	54%
	Other Groups	Tested with Accommodati..	30%	35%
	Starting Quartile	Bottom (<=25)	47%	60%
		Second (51-75)	33%	31%
		Third (26-50)	33%	46%

Change in Normal Curve Equivalent

School	Category	Subcategory	Mathematics	Reading
All Schools	Overall	Overall	-1.3	3.6
	Class	300	-4.2	1.6
		301	-3.1	3.4
		308	2.0	0.2
		312	-4.1	5.5
		200	6.5	8.4
		212	0.5	7.1
		302	-0.2	5.7
	Gender	F	0.4	5.1
		M	-3.1	2.0
	Grade	2	3.1	5.3
		3	-1.4	4.1
		4	-6.3	3.5
		5	-4.3	3.6
		6	-0.8	4.0
		7	2.9	3.6
		8	-0.3	0.1
	Race/Ethnicity	Black or African American	-1.1	3.7
	Other Groups	Tested with Accommodati..	-7.0	1.1
	Starting Quartile	Bottom (<=25)	0.9	5.9
		Second (51-75)	-10.0	-4.8
		Third (26-50)	-5.0	0.2
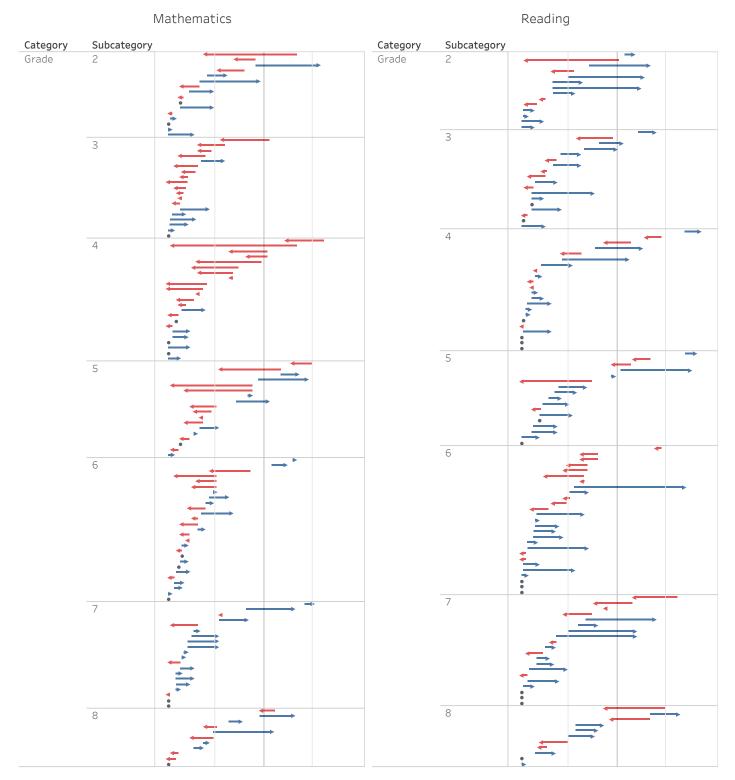
Prepared by Seth Kaufman

NWEA MAP Growth Summary

Arrow Map of Percentile Change
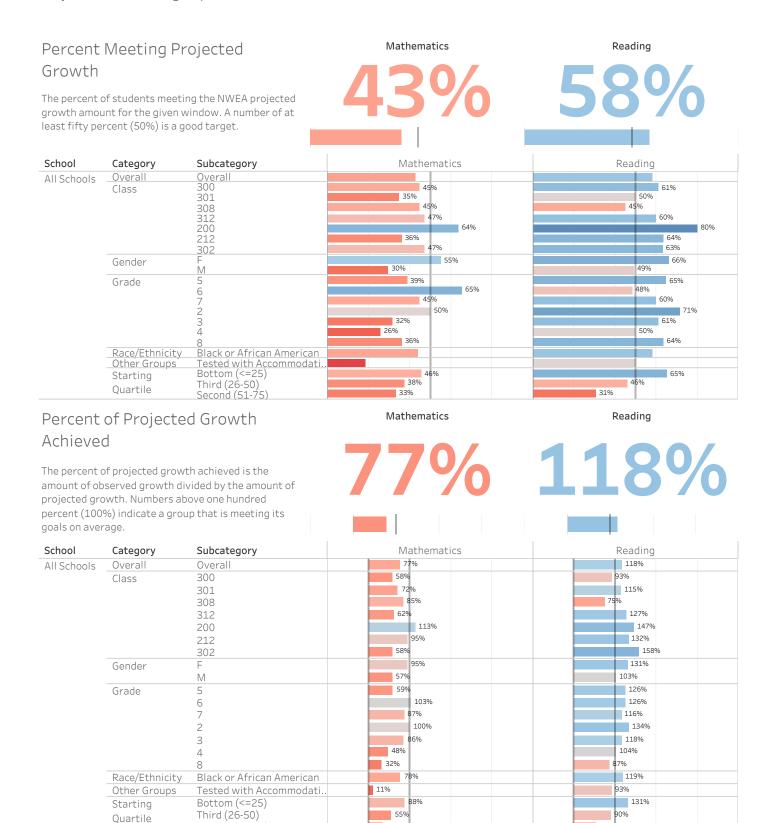
The below charts display each student's change in national percentile ranking from Fall 17-18 to Fall 18-19. Within each subcategory and subject, students are listed in order of their starting percentile. The color and the direction of the arrow indicate the direction of change. Circles represent students whose percentile did not change.
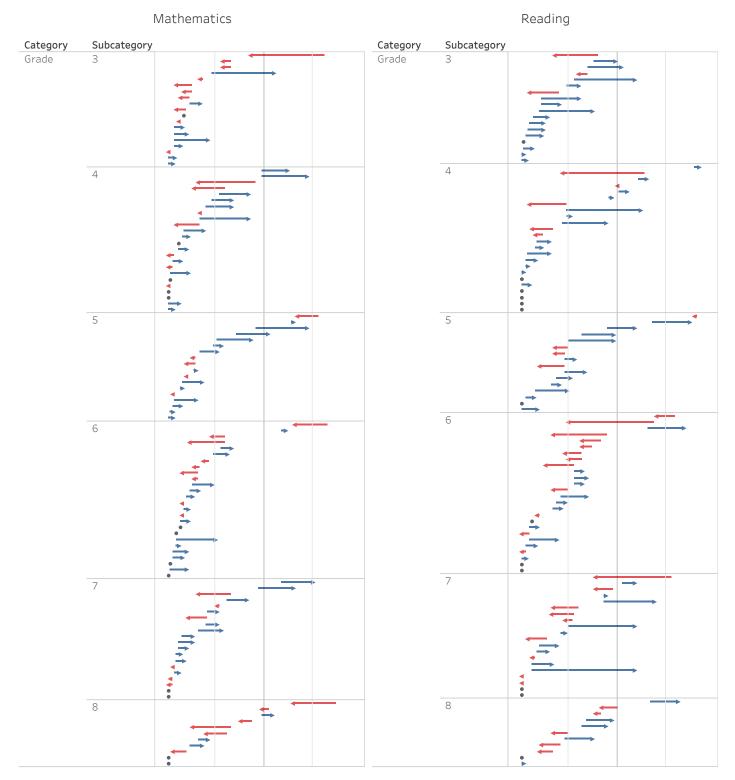
NWEA MAP Growth Summary

Projected Growth Subgroups

Percent Meeting Projected Growth

The percent of students meeting the NWEA projected growth amount for the given window. A number of at least fifty percent (50%) is a good target.

Mathematics **43%**

Reading **58%**

School	Category	Subcategory	Mathematics	Reading
All Schools	Overall	Overall		
	Class	300	45%	61%
		301	35%	50%
		308	45%	45%
		312	47%	60%
		200	64%	80%
		212	36%	64%
		302	47%	63%
	Gender	F	55%	66%
		M	30%	49%
	Grade	5	39%	65%
		6	65%	48%
		7	45%	60%
		2	50%	71%
		3	32%	61%
		4	26%	50%
		8	36%	64%
	Race/Ethnicity	Black or African American		
	Other Groups	Tested with Accommodati..		
	Starting Quartile	Bottom (<=25)	46%	65%
		Third (26-50)	38%	46%
		Second (51-75)	33%	31%

Percent of Projected Growth Achieved

The percent of projected growth achieved is the amount of observed growth divided by the amount of projected growth. Numbers above one hundred percent (100%) indicate a group that is meeting its goals on average.

Mathematics **77%**

Reading **118%**

School	Category	Subcategory	Mathematics	Reading
All Schools	Overall	Overall	77%	118%
	Class	300	58%	93%
		301	72%	115%
		308	85%	75%
		312	62%	127%
		200	113%	147%
		212	95%	132%
		302	58%	158%
	Gender	F	95%	131%
		M	57%	103%
	Grade	5	59%	126%
		6	103%	126%
		7	87%	116%
		2	100%	134%
		3	86%	118%
		4	48%	104%
		8	32%	87%
	Race/Ethnicity	Black or African American	78%	119%
	Other Groups	Tested with Accommodati..	11%	93%
	Starting Quartile	Bottom (<=25)	88%	131%
		Third (26-50)	55%	90%
		Second (51-75)	33%	54%

NWEA MAP Growth Summary

Growth Overview

Percent Increasing Percentile

Mathematics
53%

Reading
56%

A percentile represents the percent of students in the sample who scored lower than the student in question. The percent of students increasing their percentiles is an indicator of the **breadth** of growth across students who were present for both the start and end tests. A number above fifty percent (50%) indicates a class in which most students are advancing faster than their peers nationwide.

Change in Normal Curve Equivalent

Mathematics
1.6

Reading
2.2

The change in normal curve equivalent (NCE) is an indicator of the **amount** of growth across students who took both tests. NCEs represent relative student ability scores on a scale from 1 to 99 and can be averaged and compared. A student who grows at an typical level will have a change in NCE of around zero. A positive number on this measure indicates that students are growing faster than their peers nationwide.

Percentile of the Average Student
for Start Season(s) and Fall 18-19 (End)

Mathematics

Start Season	12
End Season	14

Reading

Start Season	16
End Season	19

The percentile of the average student represents the rough percentage of students across the country who scored lower than the average student in the cohort we are examining. If the whole cohort of students is improving relative to their peers we should see this number increase from the start to the end season. A decrease means that students are losing ground compared to their peers.

Student Percentile Scatterplots

The scatterplots above display students' percentiles from the start season (x-axis) and Fall 18-19 (y-axis). The size of the bubble represents the number of students with that pairing of start and end percentiles. Overlapping bubbles are colored darker. Bubbles above a 45 degree line represent improvement and those below represent decline.

Notes

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Prepared by Seth Kaufman

NWEA MAP Growth Summary

% Increasing %ile and NCE Change Subgroups

The Montessori School of Englewood

Spring 17-18 to Fall 18-19

Percent Increasing Percentile

School	Category	Subcategory	Mathematics	Reading
All Schools	Overall	Overall	53%	56%
	Class	300	61%	57%
		301	55%	47%
		308	45%	45%
		312	59%	61%
		302	53%	47%
	Gender	F	55%	66%
		M	50%	44%
	Grade	3	42%	78%
		4	54%	58%
		5	72%	69%
		6	50%	42%
		7	60%	45%
		8	27%	45%
	Race/Ethnicity	Black or African American	52%	57%
	Other Groups	Tested with Accommodati..	46%	24%
	Starting Quartile	Bottom (<=25)	55%	59%
		Third (26-50)	48%	50%

Change in Normal Curve Equivalent

School	Category	Subcategory	Mathematics	Reading
All Schools	Overall	Overall	1.6	2.2
	Class	300	2.8	2.8
		301	3.2	-0.7
		308	-0.5	-1.9
		312	1.9	4.3
		302	1.0	2.1
	Gender	F	2.1	4.3
		M	1.1	-0.2
	Grade	3	1.1	6.4
		4	2.4	1.7
		5	4.1	5.2
		6	1.7	-1.3
		7	1.9	1.3
		8	-3.9	0.9
	Race/Ethnicity	Black or African American	1.6	2.1
	Other Groups	Tested with Accommodati..	1.1	-0.4
	Starting Quartile	Bottom (<=25)	2.8	3.8
		Third (26-50)	-0.4	0.2

NWEA MAP Growth Summary

Arrow Map of Percentile Change

The below charts display each student's change in national percentile ranking from Spring 17-18 to Fall 18-19. Within each subcategory and subject, students are listed in order of their starting percentile. The color and the direction of the arrow indicate the direction of change. Circles represent students whose percentile did not change.

Mathematics

Reading

Category	Subcategory
Grade	3
	4
	5
	6
	7
	8

Category	Subcategory
Grade	3
	4
	5
	6
	7
	8

Exhibit C

THE **Montessori School of Englewood** | A Chicago Public Charter School

The new budget for FY19 results in a $152k surplus. This surplus incorporates the following activity

- Implementing the escalated programming with the new Head Start and PreSchool For All funding
- Enrollment for k-8 at 258 and preschool at 80 slots
- This includes the new $70k child care funding and related expenses
- Last year CPS provided an additional $90k to make up for PCTC reduced funding. This budget incorporates $61k. Mary Bradley confirmed funding is coming but amounts are not final.
- Although we are spending $215k on activities related to last year's restricted funding, none of that revenue is reflected here. It was in last year's financials.
- Board Designated funding of $25k is included in revenue to pay for the Giving Tree
- CTPF estimated penalties and late payments of $57k

FY19 PCTC Rates

	Enrollment	Change	FY18 Rate	Total	
I&O	258	100.0%	$9,003.52	$2,322,908.16	$58,072.70
Special Ed	258	100.0%	$1,113.94	$287,396.52	$7,184.91
			$10,117.46	**$2,610,304.68**	$2,585,926.38
					($24,378.31)
Supplemental Special Education				$128,299.00	
		Increased SPED 11/9/18		$171,216.00	
					($42,917.00)
			Total Sped	$415,695.52	

Totals	Charter School	Title I	PreSchool	Montessori Training	Operations	Total
Revenue						
4000 CPS PCTC	2,322,908.16	-	-	-	-	2,322,908.16
4005 CPS Other Funds	75,000.00	-	-	-	-	75,000.00
4005 Special Education	287,396.52	-	-	-	-	287,396.52
4006 Supplemental Special Education	171,216.00	-	-	-	-	171,216.00
4010 Facilities	-	-	-	-	-	-
4100 Federal Title Funds						
4111 Title I	-	180,033.64	-	-	-	180,033.64
4112 Title II	8,552.50	-	-	-	-	8,552.50
4113 Title III	-	-	-	-	-	-
4114 Title IV	-	-	-	-	-	-
4200 Other Government Funding	70,000.00	-	971,154.00	-	-	1,041,154.00
4300 Philanthropy						
4310 Individuals Donations	-	-	-	-	150,000.00	150,000.00
4320 Corporate Donations	-	-	-	-	-	-
4330 Foundation Donations	-	-	-	-	300,000.00	300,000.00
4390 Special Events	-	-	-	-	-	-
4399 Special Events Expense	-	-	-	-	-	-
4400 Student Fees	19,500.00	-	-	-	-	19,500.00
4500 In-kind Contributions	-	-	-	-	-	-
4510 Food Service	-	-	-	-	-	-
4520 Rent	-	-	-	-	-	-
4900 Other Revenue	-	-	-	-	-	-
4990 Board reserve	-	-	-	-	25,000.00	25,000.00
4999 Release from Restriction	-	-	-	-	-	-
Total Income	2,954,573.18	180,033.64	971,154.00	-	475,000.00	4,580,760.82
Expenses						
5000 Salaries	1,311,637.85	203,868.37	888,552.92	70,000.00	99,137.68	2,573,196.82
5100 Taxes & Benefits	-	-	-	-	-	-
5110 Health/Dental/Life/ADD benefits	157,396.54	24,464.20	106,626.35	8,400.00	11,896.52	308,783.62
5120 Pension CTPF	188,163.79	22,425.52	80,203.17	-	1,132.80	291,925.28
5130 Pension 403b	-	-	-	-	-	-
5140 FICA & Medicare	50,170.15	15,595.93	68,059.70	5,355.00	7,435.01	146,615.79
5150 Unemployment Taxes	-	-	-	-	-	-
5160 Worker's Comp	10,165.19	1,579.98	6,886.29	542.50	768.32	19,942.28

Totals	Charter School	Title I	PreSchool	Montessori Training	Operations	Total
5200 Professional Development	17,000.00	-	6,000.00	10,000.00	-	33,000.00
5220 Conferences, Workshops, Conventions	2,500.00	-	-	-	-	2,500.00
5210 Staff Recruitment	-	-	-	-	-	-
5220 Consultants/Contractors	56,748.00	-	5,000.00	-	51,500.00	113,248.00
5300 Direct Student Costs	-	-	-	-	-	-
5310 Classroom Supplies	20,750.00	-	10,445.45	41,000.00	-	72,195.45
5320 Educational Materials	13,666.67	-	-	17,000.00	-	30,666.67
5330 Instructional Equip & Technology	10,000.00	-	-	-	-	10,000.00
5340 Food Service	-	-	-	-	-	-
5350 Transportation/field trips/student events	19,726.00	-	10,000.00	-	-	29,726.00
5360 Consultants (RSP, Special Ed)	296,332.00	-	3,500.00	10,000.00	-	309,832.00
5399 Other Direct Student Costs	4,000.00	-	4,500.00	-	-	8,500.00
5400 Office Supplies	20,035.87	-	2,500.00	-	-	22,535.87
5410 Accounting & Audit	-	-	-	-	160,900.00	160,900.00
5420 Legal	-	-	-	-	-	-
5430 Payroll Fees	7,200.00	-	-	-	-	7,200.00
5440 Phone & Internet	3,600.00	-	-	-	-	3,600.00
5450 Printing & Copying	15,100.75	-	-	-	-	15,100.75
5470 CPS Admin Fee	78,309.14	-	-	-	-	78,309.14
5480 Meals & Travel	3,500.00	-	2,500.00	-	-	6,000.00
5500 Rent	-	-	-	-	-	-
5510 Utilities	13,200.00	-	-	-	-	13,200.00
5520 Repairs & Maintenance	58,000.00	-	-	-	-	58,000.00
5530 CPS Facility Fee	-	-	-	-	-	-
5540 Consultants (Security, Custodial)	27,000.00	-	-	-	-	27,000.00
5600 Corporate Insurance	23,500.00	-	-	-	-	23,500.00
5610 Student Recruitment	2,600.00	-	-	-	-	2,600.00
5700 Special Events (Development)	-	-	-	-	5,000.00	5,000.00
5800 Depreciation	-	-	-	-	10,200.00	10,200.00
5810 Capital Lease	-	-	-	-	36,594.67	36,594.67
5900 Other Expenses	8,500.00	-	-	-	-	8,500.00
Total Expenses	2,418,801.95	267,934.00	1,194,773.88	162,297.50	384,564.99	4,428,372.33
Change in Net Assets	535,771.23	(87,900.36)	(223,619.88)	(162,297.50)	90,435.01	152,388.49

Exhibit D

The Montessori School of Englewood
Presentation to the Board of Directors
November 10, 2018

giving tree
associates

1

Introductions

Giving Tree Associates Team

Judy Gadiel
Senior Consultant

Emily Halpern
Associate Consultant

TODAY'S AGENDA

OVERVIEW

Assessment Overview

Interviews & Process

Areas of Focus

Board; Campaign; Communications; Infrastructure Support

Fundraising Strategy for the MSE

Priority Recommendations

Immediate Next Steps
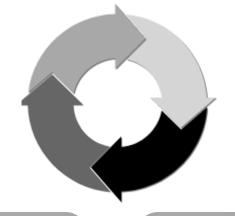
Board Governance, Development Staffing

Q & A and Discussion

ORGANIZATIONAL LIFE-CYCLE

Stage 1: Start Up

Stage 2: Adolescent

Stage 3: Established

Stage 4: Review & Renew

Stage 5: Idea & Invention

4

ORGANIZATIONAL LIFE-CYCLE

What stage are you?

01

Stage 1: Start- Up

- Program less formal
- Little hierarchy
- Informal systems
- Dependent on few funding sources

02

Stage 2: Adolescent

- New programs emerge
- Strategic division of labor
- Expand board
- Formalize systems
- Undercapitalized

03

Stage 3: Established

- Programs well established
- Succession planning begins
- Board focus on sustainability
- Cash reserve built

04
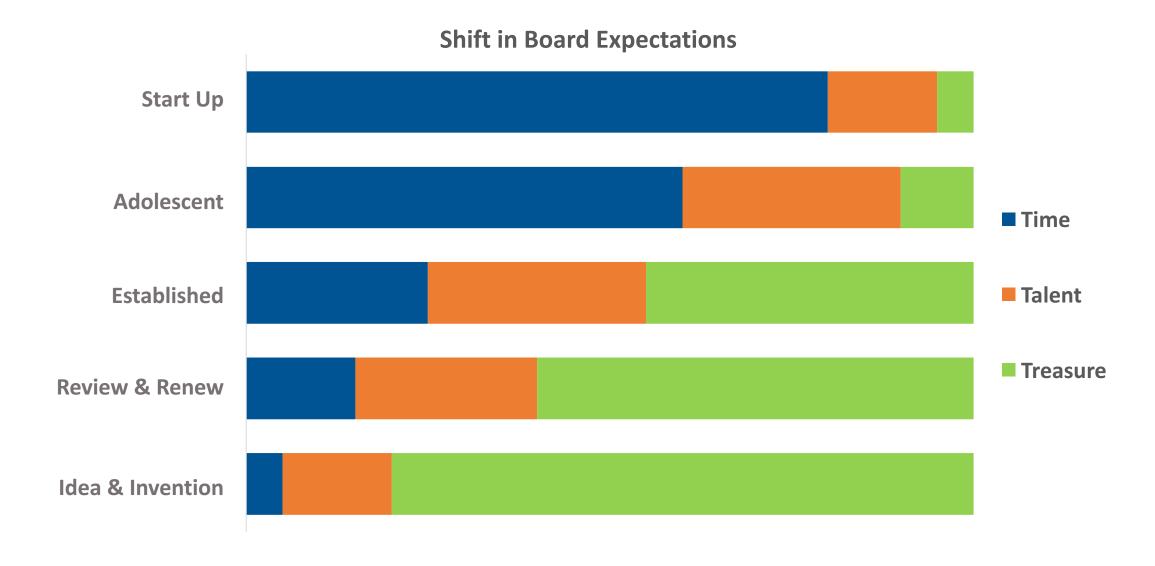
Stage 4: Review & Renew

- Programs may stagnate
- Founder may leave
- Board may lose engagement
- Systems may need retooling
- Fundraising may be difficult

05

Stage 5: Idea & Invention

- Program emerges
- Visionary leader
- Board hand picked
- Fundraising on emotions

CYCLE OF BOARD DEVELOPMENT

Shift in Board Expectations

Legend: ■ Time ■ Talent ■ Treasure

Categories: Start Up, Adolescent, Established, Review & Renew, Idea & Invention

ASSESSMENT PARTICIPANTS

- Thomas Hale, Board President
- Rita Nolan, Executive Director
- Cynthia Garbutt, Advisor to the Board
- Maggie Mikuzis, Executive Assistant

- Matt Tomczak, Vanderloo Finance
- Karen Anderson, Board Vice-President
- Joe Motto, Board Secretary
- Group of 8 teachers/faculty

Topics of discussion:
* Board Role and Structure * Individual Giving * Major Gifts
* Funding Priorities * Donor Engagement * Gift Tracking

ASSESSMENT
Four Focus Areas

01

BOARD AND LEADERSHIP DEVELOPMENT
- Lifecycle of the board
- Board's role in fundraising
- Structure
- Committees

02

CAMPAIGN
- Current fundraising efforts
- Major gifts
- Priority funding areas

03

COMMUNICATIONS
- Website, email, Facebook
- Newsletter & annual report
- MSE messaging

04

INFRASTRUCTURE SUPPORT
- Donor and gift tracking
- Staffing

GIVING TREE PHILOSOPHY
Overview

Relationship Based Fundraising

- Engage donors in meaningful ways

- Cultivate relationships

- Regular touchpoints with donors and prospects

Role of Lay Leadership

- Volunteers = primary fundraisers

- Build structure and capacity of the board

Building a Culture of Philanthropy

- Culture of giving and asking

- Campaign messaging targeted and consistent for annual needs

- Systems and staffing to support efforts

MSE FUNDRAISING STRATEGY
Overview

01

BOARD AND LEADERSHIP DEVELOPMENT
- Transition and formalize the role of the board to focus on governance and philanthropy

02

CAMPAIGN
- Create annual campaign plan to raise
- significant unrestricted operating dollars
- Focus on major gifts from individuals and foundations
- Intentional stewardship and recognition
- Supported by campaign calendar

03

COMMUNICATIONS
- Develop year-round donor centric communication strategy to educate and engage the donor community

04

INFRASTRUCTURE SUPPORT
- Transition to the use of a donor database system to record, track and report on fundraising activity
- Build professional support via full time development professional
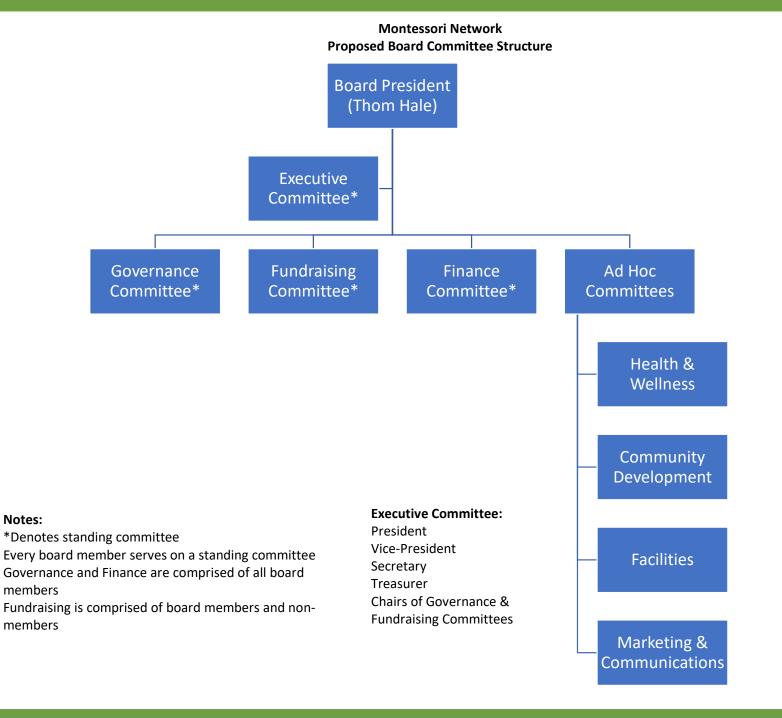
PRIORITY RECOMMENDATIONS
Board and Leadership

Redefine role of the board and member expectations

Build a governance committee to examine committee structure, board membership, term limits, & succession planning

Provide skill building and message training

**Montessori Network
Proposed Board Committee Structure**

```
                    ┌─────────────────┐
                    │ Board President │
                    │  (Thom Hale)    │
                    └─────────────────┘
                             │
                    ┌─────────────────┐
                    │   Executive     │
                    │  Committee*     │
                    └─────────────────┘
                             │
      ┌──────────────┬───────┴───────┬──────────────┐
┌───────────┐ ┌───────────┐ ┌───────────┐ ┌───────────┐
│ Governance│ │Fundraising│ │  Finance  │ │  Ad Hoc   │
│Committee* │ │Committee* │ │Committee* │ │Committees │
└───────────┘ └───────────┘ └───────────┘ └───────────┘
                                                │
                                         ┌─────────────┐
                                         │  Health &   │
                                         │  Wellness   │
                                         └─────────────┘
                                         ┌─────────────┐
                                         │ Community   │
                                         │ Development │
                                         └─────────────┘
                                         ┌─────────────┐
                                         │  Facilities │
                                         └─────────────┘
                                         ┌─────────────┐
                                         │ Marketing & │
                                         │Communications│
                                         └─────────────┘
```

Notes:
*Denotes standing committee
Every board member serves on a standing committee
Governance and Finance are comprised of all board members
Fundraising is comprised of board members and non-members

Executive Committee:
President
Vice-President
Secretary
Treasurer
Chairs of Governance &
Fundraising Committees

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PRIORITY RECOMMENDATIONS
Campaign

Articulate a clearly defined case for support for unrestricted giving

Create personalized strategies for each major donor and prospect

Host small parlor meetings to cultivate & steward high capacity donors

13

PRIORITY RECOMMENDATIONS
Campaign

Grow institutional giving program through private foundations

Create a Leadership Council of thought leaders, philanthropists & business leaders to expand outreach

Build relationships with donors and show gratitude for their support

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Donor Stewardship Plan

Giving Level	$25,000+	$5,000 - $24,999	$1,500-$4,999	$0-$1,499
Gift Acknowledgement				
Phone call from Executive Director or Board President	✔			
Phone call from development director or board member		✔		
Acknowledgement letter sent within 1 week with personal note (from development director, board chair or development chair)	✔	✔	✔	
Standard letter sent within 1 week signed by development director				✔
Email acknowledgement (for donors who give online)	✔	✔	✔	✔
Stewardship				
Lunch with Executive Director and Board President 1-2x year	✔			
Invitation to annual donor appreciation event (spring/summer)	✔	✔		
Donor thank you video from students	✔	✔	✔	✔
Donor Recognition				
Name listing on website and annual report	✔	✔	✔	✔
* Consider naming opportunities for gifts of $100K and above				

PRIORITY RECOMMENDATIONS
Communications

Update the MSE website to keep it current and fresh

Develop a communication plan to share the stories of the Montessori School of Englewood

Create a social media strategy and quarterly newsletter to educate & engage the community and ask for support

Development Calendar

Month	OCTOBER 2018	OCT/DEC 2018	NOVEMBER 2018	DECEMBER 2018	JANUARY 2019
Focus Area	Communications	Major Gifts	Communications	Broad Solicitation	Communications/ Recognition
Notes	Quarterly newsletter sent via email	Individual meetings with donors to discuss year-end giving	Annual report sent via mail and electronically	Year-end e-blast	Quarterly newsletter with donor thank you

Month	FEBRUARY/MARCH	APRIL 2019	APRIL 2019	MAY 2019	MAY 2019
Focus Area	Major Gifts	Major Gifts	Communications	Leadership Council	Communications
Notes	Save the date and personal outreach for parlor meeting in April	Parlor meeting in downtown location	Quarterly donor newsletter	Kick Off Meeting	Video from the year-end student performance

Month	MAY 2019	MAY 2019	JULY 2019	AUGUST 2019	OCTOBER 2019
Focus Area	Broad Solicitation	Major Gifts	Communications	Board Giving	Communications
Notes	Direct mail appeal with electronic follow up	Invite donors to attend graduation	Quarterly donor newsletter	Board campaign	Quarterly newsletter; highlight CMR and back to school

Month	OCT/DEC 2019	NOVEMBER 2019	NOVEMBER 2019	DECEMBER 2019
Focus Area	Major Gifts	Communication/ Recognition	Leadership Council	Broad Solicitation
Notes	Individual meetings with donors to discuss year-end giving	Thank you notes and video of students	Leadership Council Meeting	Giving Tuesday/Year End Appeal

PRIORITY RECOMMENDATIONS
Infrastructure Support

Begin tracking all interactions with donors and prospects

Invest in a cloud based donor database system

Hire a full time, seasoned Director of Development, supported by admin support and contractual grant writer

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Immediate Next Steps:
Governance Committee
Development Staffing

Thank You!

Judy Gadiel: judy@givingtreeassociates.com
Emily Halpern: emily@givingtreeassociates.com
www.givingtreeassociates.com

Introduction

Giving Tree Associates (Giving Tree) was hired in August 2018 to assess the Montessori School of Englewood's (MSE) fundraising program and develop a comprehensive fundraising strategy, with a focus on major donor development.

The assessment included a review of the school's materials along with meetings with board members, teachers, and staff of the school. Additionally, Giving Tree consultants meet weekly with Thom Hale and work in partnership with Cynthia Garbutt, Advisor to the Board.

The assessment focuses on four main areas as listed below, with the following recommendations:

1. **Board and Leadership Development:** Recognizing the organization's developmental stage, support an intentional shift and formalization of the role of the board to focus on philanthropy;
2. **Campaign**: With a focus on major gift development, create an annual campaign to raise essential unrestricted operating dollars; the campaign focuses on major gifts from individuals and foundations, seeks to identify strategic partners, and is supported by a strong donor stewardship and recognition program;
3. **Communications:** Develop a year-round donor centric communications strategy to educate and engage the donor community;
4. **Infrastructure Support:** Transition to the use of a donor database system to record, track and report on donor and fundraising activity; build professional support for fundraising efforts through hiring a full time, experienced, Director of Development.

Board and Leadership Development

The Montessori Network (d.b.a. as the Montessori School of Englewood) Board of Directors is in a time of transition, appropriately for an organization still in its early years of organizational development. The role of the board in the first few years was focused on building the program and structure and initial avenues for philanthropic support. As the program and professional leadership are beginning to stabilize, the board's role needs to shift as well, to a stronger focus on governance and capacity building. Training is important to ensure board members gain skills and comfort level to support them in this expanded role.

Role in Fundraising

Consistent with many start up boards, there is no giving requirement for board members and no clear expectations about the board's role in fundraising. Moving forward, Giving Tree recommends that the board have a primary role in philanthropy, through their own giving, as well as through:

- Identifying prospective individual donors, corporations and foundations
- Attending meetings with prospective donors to educate them about the school and learn about their philanthropic interests
- Bringing prospective donors to the school and other events
- Thanking current donors

Board Governance

The governance of an organization is necessary to ensure the board is fulfilling its duties and responsibilities at the highest level of efficiency and effectiveness in support of the organization's mission. Governance looks at board structure and practices in areas such as: Board size, committees and membership; Role and expectations of board members; Recruitment and onboarding; Leadership development and training; and Board succession planning.

As the MSE is becoming more established and the board's role is shifting, it is important to focus on governance so that the board has what it needs to move the organization into its next phase of development. Giving Tree's assessment examined several areas of governance as listed below:

Board Structure

Giving Tree recommends creating a formal committee structure with the following primary committees essential for capacity building:
- Executive Committee
- Finance Committee
- Governance Committee
- Fundraising Committee

Each committee must have a clearly defined description with a committee chair to lead the group toward agreed upon goals. Every board member is expected to be on a specific committee and to actively participate. The chairs of each committee are part of the Executive Committee and play a primary role in leading the organization.

Board Membership and Recruitment

To address priorities of 1) diversity in leadership; and 2) a focus on fundraising, Giving Tree recommends the following:
1. Identify and recruit two individuals to the board who are racially diverse, possess a willingness and capacity to fundraise, and have a connection or understanding of the local community;
2. Recruit parents, students and members of the local community, and activate the School Advisory Board, as described in the bylaws.

Member Expectations

Giving Tree recommends redefining the role of the board and responsibilities of membership, and clearly communicating this to prospective and current members.

Term Limits

Giving Tree recommends implementing limits on the number of terms an individual can serve and including intentional conversations between terms.

Campaign

Overview

A small group of board members and Rita are the primary fundraisers for the organization. There is no formal fundraising program and no development staff member. There are significant current and prospective donors who are looking to engage with the school on a larger and more formal level; there is limited capacity on the

staff to follow up with donors, create donor centric communications, build and manage a donor tracking system, and support lay leadership in donor engagement.

In FY18, the Montessori Network raised close to $765,000 from individuals, foundations and corporations; a 10% increase over FY17. An additional $1 million was reported in in-kind contributed services. In general, dollars are coming from a small number of funders.

The MSE needs a formal annual campaign strategy supported by a year-round development calendar and a case for support. The case for support, focused on unrestricted giving, clearly defines reasons for giving, the impact of donations, and the need for philanthropic support.

Individual Giving
In FY18, individual donors contributed close to $240,000 through gifts of $150,000 - $25. Based on annual report listings, the number of donors in FY18 appears to be less than in FY17. The leadership recognizes the need to grow the donor base for the school and identify individuals who can give at multiple levels.

Major Gifts
In FY18, 8-10 donors gave above $25,000 to MSE, with at least three donors making gifts of $100,00 - $150,000. There is very limited cultivation and stewardship with these and other donors and prospects, due to a lack of staff and leadership capacity and expertise in managing a major giving program. Moving forward, it will be important to engage a development professional with experience in major gift development to build a successful program. Additionally, Giving Tree recommends developing a formal plan for stewardship and recognition of major donors, to ensure donors remain connected with the school throughout the year and generously thanked for their partnership.

To expand the major gifts program, Giving Tree recommends prospecting with each board member to learn more about their networks and capacity for major giving. Board members can be engaged in the fundraising process by assigning each one as leadership contact for a minimum of three donors or prospects. As leadership contact, they become the primary relationship manager, sharing information on the school, inviting them to events, thanking them for their support, and ideally, soliciting gifts. Training is encouraged to support board members in this role and help increase comfort and skills.

One way to engage with prospective major stakeholders is to create a formal structure of thought leaders, philanthropists and business leaders with an interest in supporting the MSE. Giving Tree recommends creating a Leadership Council that will serve as an avenue for outreach to new constituencies, prospective donors and strategic partners.

Foundations
MSE was awarded approximately $277,000 from eight private foundations in FY18. MSE's mission and program have many elements that would be attractive to foundations, both for the individual school and on a macro systemic level. Foundation funding is an area of potential significant growth for the school, and Giving Tree recommends this be a priority focus for a fundraising program.

Corporations and Strategic Partnerships
The MSE has partnerships with organizations and corporations throughout the city. One example is the Ilinois Bar Association, whose members offer weekly tutoring in their offices for students. There is tremendous

opportunity to strengthen existing partnerships and identify new ones for hands-on volunteer work, funding, and program development.

Events

Giving Tree recommends using smaller events to cultivate and steward major donors and recommends reconsidering holding a larger event until a cost/benefit analysis can be completed.

Stewardship and Recognition

Moving forward, it will be important to implement consistent activities and opportunities for building relationships with donors and expressing gratitude. Activities can include listing all donors on the website and in newsletters, inviting donors to special events at the school, holding small gatherings hosted by a board member, and offering donors access to Rita and other experts in the field who can share cutting edge knowledge on emerging issues related to Montessori education in urban communities.

Communications

The Montessori School of Englewood communicates to their audiences on digital platforms, such as their newsletter, Facebook page, and website. Giving Tree recommends setting up consistent communication practices so that donors and community members can be engaged on a regular basis. Such practice includes a year-round communications calendar with multiple touchpoints for donors, consistent messaging, and donor recognition.

Website

Much of the information on the MSE website is out of date, including board member listing, supporters, budget, events, and more. As the website is an organization's outward facing representation, it is important that information is accurate and current. Giving Tree strongly recommends that updating the website become a designated part of a staff member's portfolio, and that all information be updated regularly.

Email Marketing

The Montessori School of Englewood uses MailChimp as a platform for email marketing. The master list of 1,487 email addresses is housed within MailChimp and utilized for all email updates. MSE sends school-wide emails to parents sporadically. There is limited donor-centric communication, and the last robust email newsletter was sent in October of 2017. Giving Tree worked with the team at MSE to develop a fall newsletter that was shared with the full email list in early October of 2018. Giving Tree recommends building upon this by sending a quarterly newsletter that is developed specifically for donors.

Social Media

The Montessori School of Englewood has an active presence on Facebook. Giving Tree recommends that the MSE prioritize taking photos and videos at school events as this collateral is beneficial for future online and print communications. Additionally, creating a social media strategy and calendar will allow the school to reach its audience more regularly.

Infrastructure Support

Database Management

The Montessori School of Englewood currently tracks all gift information in a Google Sheet, referred to as the Dashboard. This gift tracking system has been in place since 2016, when Maggie Mikuzis began at MSE as the Executive Assistant.

Moving forward, as MSE looks to build a more formal fundraising program, Giving Tree strongly recommends implementing a cloud based donor database program that connects to the email marketing program. Such a program is used to create a comprehensive profile for each donor and prospect including contact information and constituent type (i.e. board member, professional, parent); interactions with the school; interests and volunteer involvement; and leadership contact. Giving history is recorded including gift date, amount, and appeal; a grants management program can help manage foundation relations and reporting deadlines. A database also allows for analyzing and reporting on fundraising activity.

Development Staffing
In order to grow the fundraising program for MSE, it is essential to have a staff member dedicated to development, managing the program and supporting Rita, Thom and the board. Up to this point, the budget priorities have been reflective of the school's commitment to student facing staff and projects. Directing operating dollars toward a development staff member reflects a shift for the leadership and a commitment to building a sustainable program of philanthropy.

Giving Tree strongly recommends prioritizing the hiring of a full-time Director of Development, supported by a part time administrator and a contractual grant writer. The ideal candidate is a seasoned professional with a minimum of five years in the field, with the skills, wisdom and knowledge to connect with high profile donors. The Director of Development will ideally have experience in major gift development, foundation relations, board development, and corporate giving. MSE leadership has identified several potential donors who may be interested in funding this position.

Summary and Next Steps
The Montessori School of Englewood is entering a new stage in its organizational development, with a need to stabilize and grow its revenue through philanthropy.

Over the next few weeks, Giving Tree will finalize a case for support and Director of Development job description and continue to support Thom in his engagement and solicitation of major donors/prospects. Giving Tree welcomes the opportunity to continue to work with the Montessori School of Englewood to build upon current organizational strengths and practices to create a strategic, sustainable fundraising program that supports the organization in its vision and mission.

The Montessori School of Englewood
Recommendations

The Montessori School of Englewood is entering a new stage in its organizational development, with a need to stabilize and grow its revenue through philanthropy. Giving Tree recommends the organization formalize its fundraising program with the following priorities:

1. **Board and Leadership Development:** Recognizing the organization's developmental stage, support an intentional shift and formalization of the role of the board to focus on philanthropy;
2. **Campaign**: With a focus on major gift development, create an annual campaign to raise essential unrestricted operating dollars; the campaign focuses on major gifts from individuals and foundations, seeks to identify strategic partners, and is supported by a strong donor stewardship and recognition program;
3. **Communications:** Develop a year-round donor centric communications strategy to educate and engage the donor community;
4. **Infrastructure Support:** Transition to the use of a donor database system to record, track and report on donor and fundraising activity; build professional support for fundraising efforts through hiring a full time, experienced, Director of Development.

Board and Leadership Development
Role in Fundraising
Giving Tree recommends that the board have a primary role in philanthropy, through their own giving, as well as through:
- Identifying prospective individual donors, corporations and foundations
- Attending meetings with prospective donors to educate them about the school and learn about their interests
- Bringing prospective donors to the school and other events
- Thanking current donors

Governance
Board Structure
Giving Tree recommends creating a committee structure with the following primary committees essential for building capacity for the organization:
- Executive Committee
- Finance Committee
- Governance Committee
- Fundraising Committee

Each committee must have a clearly defined description with a committee chair to lead the group toward agreed upon goals.

<u>Membership and Recruitment</u>

In order to actively engage parents and other family members in leadership positions to ensure their voices are represented, while at the same time build a more culturally diverse governing board with capacity to grow and sustain the organization, Giving Tree recommends the following:

- Identify and recruit two individuals to the board who are racially diverse, possess a willingness and capacity to fundraise, and have a connection or understanding of the local community;
- Recruit parents, students and members of the local community, and activate the School Advisory Board.

Giving Tree also recommends that recruitment and onboarding fall under the responsibilities of the governance committee, with a more formal process that may include opportunities for engagement, meetings with current members, and mentoring.

<u>Member Expectations</u>

Giving Tree recommends redefining the role and responsibilities of board members to focus on capacity building and clearly communicating this to prospective and current members.

<u>Term Limits</u>

Giving Tree recommends implementing limits on the number of terms an individual can serve and including intentional conversations between terms. A suggested model is the following:

- Hold individual meetings with board members at the beginning and end of each term to discuss participation and determine if a trustee should be renewed for another term;
- Allow members to renew for up to three terms (total of 6 years) before taking one year off;
- Members can rejoin after one year for up to another three terms;
- Members can serve a lifetime total of 18 years.

Fundraising

Giving Tree recommends focusing on general, unrestricted giving to allow the leadership maximum flexibility to use the funds as needed. In order to do so, the following should occur:

- Create a case for support for unrestricted giving that clearly defines reasons for giving, the impact of donations, and needs for philanthropic support.
- Adopt a gift acceptance policy to address types of gifts that can be accepted, naming opportunities, allocation of funds, and other such policies.

Individual Giving

Giving Tree recommends that broad appeals be used as a way to retain and grow donors giving $1,000 and below; while those giving above $1,000 receive more personal solicitations. When there is greater staff capacity, Giving Tree recommends:

- Creating more robust appeals that share stories via images and video; print appeals can include personalized asks with past giving and specific ask amounts. Leadership can be involved in writing personal notes to prospective donors and adding names to build the mailing list.

- Gathering names and contact information from donors who contribute to peer to peer fundraising projects and incorporate them into donor stewardship and recognition activities.

Major Gifts

The MSE has expressed as a priority the development of a major gift program, which can begin with the following recommendations:

- Develop a formal plan for stewardship and recognition of major donors, to ensure donors remain connected with the school throughout the year, and generously thanked for their partnership.
- Prospect with each board member to learn more about their networks and capacity for major giving. Board members can be engaged in the fundraising process by assigning each one as leadership contact for a minimum of three donors or prospects. As leadership contact, they become the primary relationship manager, sharing information on the school, inviting them to events, thanking them for their support, and ideally, soliciting gifts. Training is encouraged to support board members in this role and help increase comfort and skills.
- Create a Leadership Council that will serve as an avenue for outreach to new constituencies, prospective donors and strategic partners. This can become a source of significant major gift revenue for the MSE, as well as a way to increase visibility of the school.

Foundations

Giving Tree recommends foundation relations become a priority focus of the MSE's fundraising program. To support this, it is recommended that MSE obtain Carolyn's spreadsheet and working list of foundations/contacts.

Events

Giving Tree recommends using smaller events as a way to cultivate and steward major donors and recommends reconsidering holding a larger event until a cost/benefit analysis can be completed.

Stewardship and Recognition

Giving Tree recommends implementing consistent activities and opportunities for building relationships with donors and expressing gratitude. Activities can include:

- Listing all donors on the website and in newsletters
- Inviting donors to special events at the school
- Holding small gatherings hosted by a board member
- Offering donors access to Rita and other experts in the field who can share cutting edge knowledge on emerging issues related to Montessori education in urban communities

Communications

Website

Giving Tree recommends that the MSE consider moving away from PayPal and using a donation system that integrates more easily with a donor database. Until then, the following changes can be made to update the PayPal donation page:

- If possible to customize the PayPal page, write a "thank you" message at the top instead of "donate to" message. Giving Tree also recommends including the school's mission.

- Include suggestions of donation amounts so that donors can click on a number. This may prompt them to give more than if they write in their own amount.
- Include a checkbox that asks if the gift is in honor or in memory of someone.
- Require that all donors include their mailing addresses as a way to more fully capture donor information.
- Include a question about how a person wants to be listed for recognition.

Giving Tree strongly recommends that updating the school website become a designated part of a staff member's portfolio, and that all information be updated regularly. Begin by making the following updates to the website:
- Link the Chicago Montessori Residency website to the main Montessori School of Englewood website so that supporters can see a full picture of the offerings.
- Update the "Giving" page on MSE's website to include information about the Board of Directors, current supporters, and the donor newsletter.
    - Update the "Board of Directors" page to reflect current membership of the board; ensure there are pictures of each member
    - Mailchimp provides a form that can be embedded into the website so that a donor can easily sign up for the newsletter. This form would eliminate the need for manually adding each email address to the Mailchimp list.
    - The "Our Donors" page housed beneath the "Giving" page should showcase all major supporters, foundations and partnerships. This page should be segmented to include giving levels.
    - Update the budget on the "Giving" page. It currently lists a $3.1 million budget, which does not distinguish between the $450,000 operating budget and additional dollars for special projects.
- Utilize www.tmsoe.org/newsletters to house long form donor newsletters, while the "News & Events" page remains focused on student life.
- The "Events" sidebar should be populated with any upcoming events at the school, especially those open to the community.
- The home page of the MSE website should always have the most up to date information under the "Upcoming Events" and "School News" categories. Additionally, it is highly recommended that the "Contact Us" column be updated to include a newsletter sign up link.

Email Marketing
Due to the nature of online donations, MSE has the email addresses for most of their donors. The school has not overloaded its supporters with emails, thus providing a unique opportunity to capture people's attention. Giving Tree recommends sending a quarterly newsletter that is developed specifically for donors. This newsletter can highlight news about the school, teachers, students, and also include a note from Rita or Thom. To enhance the success of the newsletter, MSE should consider the following best practices:
- It is recommended that each newsletter contains a general ask for support at the end. As a means of targeting donors more specifically, it would be beneficial to create segments within the master email list.

- Since teachers are already sharing information with the families of their students, this content can be repurposed for donors. This will allow supporters of MSE to feel connected to the day-to-day mission and Montessori method.
- Within MailChimp, it would be beneficial to have a first and last name associated with each email on the master list. Doing so will allow for customized emails addressed to the correct person.

Social Media

Giving Tree recommends that the MSE prioritize taking photos and videos at school events as this collateral is beneficial for future online and print communications. Additionally, creating a social media strategy and calendar will allow the school to reach its audience more regularly.

- Consider a monthly schedule that incorporates event promotion, donor communications, and parent information so that anyone can find relevant information on the Facebook page.

Annual Report

Giving Tree recommends writing personal notes to accompany the annual report to high level donors as a means of stewarding the relationship. It is also beneficial for print copies to be brought to all donor meetings.

Infrastructure Support

Database Management

As the MSE looks to build a more formal fundraising program, Giving Tree strongly recommends implementing a cloud based donor database program that connects to the email marketing program. Such a program is used to create a comprehensive profile for each donor and prospect including contact information and constituent type (i.e. board member, professional, parent); interactions with the school; interests and volunteer involvement; and leadership contact. Giving history is recorded including gift date, amount, and appeal; a grants management program can help manage foundation relations and reporting deadlines. A database also allows for analyzing and reporting on fundraising activity. Little Green Light and Donor Perfect are two examples of donor databases that are effective, low cost and easy to use.
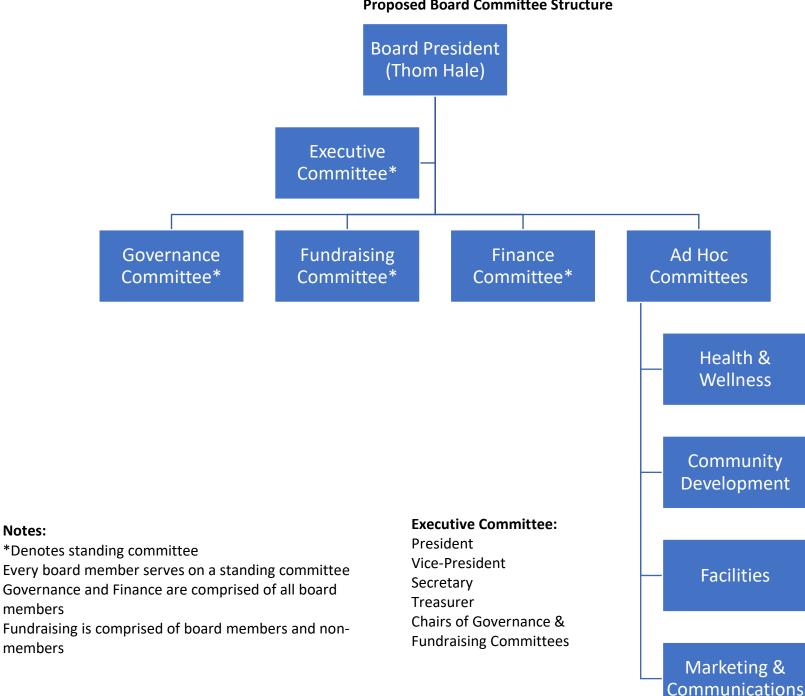
Until a database is incorporated into the MSE's development practices, consider the following recommendations:

- Using the current gift tracking Dashboard, the MSE should begin tracking more donor information including a leadership contact and donor interactions.
- Formalize policies for entering gifts into the donor dashboard, sending acknowledgements to donors, and managing all contacts.

Development Staffing

Giving Tree strongly recommends prioritizing the hiring of a full-time Director of Development, supported by a part time administrator and a contractual grant writer. The ideal candidate is a seasoned professional with a minimum of five years in the field, with the skills, wisdom and knowledge to connect with high profile donors.

Montessori Network
Proposed Board Committee Structure

Board President
(Thom Hale)

Executive
Committee*

Governance
Committee*

Fundraising
Committee*

Finance
Committee*

Ad Hoc
Committees

Health &
Wellness

Community
Development

Facilities

Marketing &
Communications

Notes:
*Denotes standing committee
Every board member serves on a standing committee
Governance and Finance are comprised of all board
members
Fundraising is comprised of board members and non-
members

Executive Committee:
President
Vice-President
Secretary
Treasurer
Chairs of Governance &
Fundraising Committees

BOARD OF DIRECTORS DESCRIPTION

The Montessori Network's Board of Directors is its governing body, responsible for overseeing the activities of the Montessori School of Englewood. The Board of Directors works as team for the benefit of the organization and in partnership with the professional staff.

Legally, the Board's responsibility falls into four categories:

Duty of Care
Board members are expected to actively participate in organizational planning and decision-making and to make sound and informed judgments. This includes oversight of the organization's assets to ensure sustainability and development of organizational goals and policies that are in line with its mission.

Duty of Loyalty
When acting on behalf of the organization, board members must put the interests of the nonprofit before any personal or professional concerns and avoid potential conflicts of interest, including the appearance of a conflict of interest.

Duty of Obedience
Board members must ensure that the organization complies with all applicable federal, state, and local laws and regulations as well as its own bylaws and policies. It must be committed to its established mission.

Duty of Transparency
Boards should ensure that an organization operates with a degree of transparency by disclosing income and expenses as well as general information about its purpose and programs. This is often done by making tax forms and other relevant information available to the public.

Additional responsibilities of the Board of Directors include the following:

- Set and periodically review the organization's mission and vision and ensure programs/services are aligned with the mission;
- Set and periodically review the board's bylaws and other policies of the organization and ensure compliance;
- Review and approve the organization's annual budget and ensure fiscal health, integrity and responsibility;
- Hire and supervise the Executive Director, set compensation package, evaluate performance, and plan for succession;
- Provide for board succession and evaluation.

Prepared by Giving Tree Associates, 2018

Members of the Montessori Network Board of Directors agree to the following:

- Make a meaningful annual personal financial contribution to the MSE; this gift should be among each member's top three philanthropic priorities
- Act as an ambassador and advocate for the MSE and raise awareness of its mission and impact
- Actively participate in fundraising activities, including but not limited to:
    - Identifying prospective individual donors, corporations and foundations
    - Cultivating prospective donors through educating them about the school and learning their philanthropic interests
    - Soliciting current and prospective donors
    - Participating in donor recognition activities
    - Attending fundraising events
- Assist in identifying prospective board members
- Actively serve and participate on a minimum of one board committee
- Serve a minimum of one 2-year term, renewable for up to three terms
- Attend and actively participate in 80% of board meetings each year
- Fulfill other responsibilities as agreed upon

BOARD FUNDRAISING COMMITTEE
OVERVIEW

Working in partnership with the Board President and Director of Development, the Fundraising Committee of The Montessori Network's board of directors is responsible for overseeing and supporting the fundraising strategy for the organization.

Members of the Fundraising Committee include board members and non-board members, all of whom are committed to the mission and values of The Montessori Network. Each member agrees to make a personal meaningful gift in support of The Montessori Network.

Fundraising Committee members play a crucial role in identifying and building relationships with prospective stakeholders and strengthening relationships with current funders. This is done through active participation in fundraising activities such as:
- Facilitating and/or hosting local parlor meetings and events
- Meeting in person with donors and prospects
- Connecting The Montessori Network with foundations, corporations and stakeholders as potential funding sources and strategic partners

Committee Member Responsibilities
- In conjunction with the Board President and Director of Development, set and monitor development goals, targets and associated strategies;
- Partner with the Board President and Director of Development to grow the individual major gifts program and strategy through:
    - Prospect identification and rating/assignment meetings
    - Cultivation, stewardship and donor recognition activities
    - Events, parlor meetings and other opportunities for relationship building and fundraising
    - Personal solicitation of major gift prospects and donors;
- Support campaign fundraising activities as agreed upon by the committee;
- Participate in fundraising-related trainings during the year, as applicable;
- Attend and actively participate in committee meetings, as scheduled.

Prepared by Giving Tree Associates, 2018

BOARD GOVERNANCE COMMITTEE
OVERVIEW

The Governance Committee of The Montessori Network is primarily responsible for review and oversight of the structure and practices of its Board of Directors to ensure it is fulfilling its duties and responsibilities at the highest level of efficiency and effectiveness in support of its mission.

The Governance Committee is a committee of the Montessori Network's board and is comprised of members of the board.

Governance Committee members play an important role in defining, communicating and/or implementing the following:
- Board structure and expectations
- Board member recruitment and onboarding
- Leadership development and training
- Bylaw review
- Board succession planning
- Board evaluation and self-assessment

Committee Member Responsibilities (according to agreed-upon priorities):
- Review current board structure and recommend any necessary changes (i.e. committees, term limits, board size);
- Review board member expectations and update to reflect current priorities of the board (i.e. fundraising, governance and fiscal oversight);
- Create and implement a recruitment strategy to expand the board with a focus on diversifying the board to better reflect the community it serves and its current priorities;
- Create and implement a board orientation and onboarding plan for new board members;
- Create a succession plan for officers;
- Create and conduct a self-assessment process for board members;
- Determine board training needs, set calendar and facilitate training opportunities;
- Periodically review bylaws and recommend necessary changes;
- Periodically review mission and vision statements of the organization;
- Attend and actively participate in regularly scheduled meetings.

Prepared by Giving Tree Associates, 2018

Exhibit E

November 10th, 2018
Executive Director Report

2018-2019 Goals

·   Authentic Montessori

CMR (Chicago Montessori Residency) has officially been accredited by MACTE (Montessori Accreditation Council for Teacher Education) for the 6-9 and 9-12 training program. This past summer we have begun the process to become accredited at the 3-6 level.

·   Aspirational and Constructive Culture- Respect, Safety, and School Family

MSE has two partnerships with the University of Chicago. Dawn Hicks is coaching goal setting around the 5E Survey from the 2017-2018 school year. TREP is coaching our social-emotional team around teacher competency and how trauma impacts behavior at school.

·   Implement a literacy plan with fidelity**.**

Nawal Casiano, a Literacy Specialist, is providing support throughout the year for teachers around literacy components for each grade level.

·   AIMSWEB is currently being used as a goal setting and monitoring benchmark for math and reading. Clare Pearson is wrapping up administering AIMSWEB to Pre-K through 8th grade.

·   Develop a strong MTSS (Multi-tiered System of Support) program.

MTSS is providing intervention Tier III students support immediately.

Through the MTSS model, The MTSS team and general education teachers will create criteria around a menu of interventions.

·   According to CPS, MSE must be at a 3.2 on the SQRP, the goal is to achieve a 3.5.

A school improvement team has been created to achieve a 3.5. The team will be responsible for creating the plan, submitting it to CPS on December 10th, and working with the CPS team periodically to ensure MSE is on track.

Faculty

·   The MTSS team hired two new employees to support teachers and students. Lori Johnson and Quentin Jones provide academic support and intervention to Tier III students.

·   MSE hired a new gym teacher, Amir James. Amir is a former gym teacher from the south suburbs and tennis coach. He will focus on teaching the basics of all sports and healthy living styles.

·   The added positions were already budgeted positions.

Family and Community Engagement

·   Ebonie Townsend has been elected President of the parent committee.

·   FACE (Family and Community Engagement) hosted parent breakfasts for the 6-9 and 9-12 classrooms. Parents were able to come and enjoy breakfast in our cafeteria. Each child presented a Montessori lesson to their parents in their classroom.

· FACE hosted a fall festival for the students. The festival included face painting, dipping candy apples, and trick-or-treating. Around 20 parents volunteered at the event.

· Carmen Williams, the Coordinator of FACE, completed a week-long training with the Ounce Prevention Fund focused on development around home visits and family and community engagement.

· EarthHeart Foundation hosts workshops for MSE mothers every Thursday around mental, emotional, social, physical, and spiritual health.

· Rush nursing students are conducting workshops for MSE parents this fall. The workshops include: stress management, CPR, hygiene, and nutrition.

Programs of Interest

· The MTSS team created an after-school reading program. The program focuses on developing literacy skills through emergent literacy practices to develop a love of learning. This after-school program is funded from a DFFS grant.

· MSE has partnered with NextWave STEM. On Mondays and Wednesdays, students K-8th grade are able to engage in a variety of robotics and science classes. This after-school program is funded from a DFFS grant.

· 50 students from K-8th grade attend Lawyers Lend a Hand every Tuesday.

· Fall sports have wrapped up, and students are currently training for the basketball season.

Head Start

· Head Start is full with 80 students and a waitlist of 10 students

· MSE received an additional 20 Head Start slots.

· This past Tuesday Head Start conducted their third policy meeting of the year.

Enrollment

· Enrollment is currently at 334 students.

· The community engagement team developed a strategic plan to immerse themselves in community events to assist with recruiting. A recruitment and enrollment plan is currently being developed and will be presented at the next meeting.

· Currently not accepting students in the upper grades, unless enrollment in the K-8th drops below the budgeted number of 258.

Building

· Attached is the building report from Joe Agate, Engineer.

Fundraising

· Corporate Donors: $3,330.08

· Grants: $120,000

· Individual Donors: $1,700

· Board contributions: $5,000

· Total amount raised: $130,008

Exhibit F

THE Montessori School of Englewood | A Chicago Public Charter School

Facilities Report
6/1/18 - Current

The following is a list of completed projects, ongoing projects, and repairs made as of June this year.

Boiler tube refit project - Both boilers needed re-tubing due to past neglect as the constant repair/replacement of the fire tubes warranted a full refit. At this time, we are only able to afford to do boiler #1 with a plan and vendor quotes in place to re-tube boiler #2 in the near future. We have implemented a boiler water treatment program to ensure the longevity of the vessel. All other Mechanicals regarding the boilers themselves are fully operational.

Air handler coil project

Two large steam coils were replaced in the air handler that provides heat/ventilation for both the gym and auditorium, these were irreparable and needed to be replaced do to multiple leaks. The coils had to be custom made, after a lot of leg work by Bob our engineer we were able to acquire them at a low cost to the school and were installed in-house. This project improves our heating efficiency and enables us to maintain constant boiler water quality.

Building Pneumatic controls

Air compressor head replaced, air leaks repaired, controls, and actuators. Thermostat replacement is in the process of being completed in-house.

Exhaust fans.

Motor replacements and full rebuild (completed in-house).

Plumbing Projects

Drinking fountains - Both banks of North and South needed major drain line replacement from the third floor to basement this required many feet of line and fittings to be replaced as the leaks were causing significant damage to the plaster work. This job was completed in-house.

Sinks / Toilets- All have been repaired in-house. This an ongoing and a never-ending project needing constant attention do to the age of the pipes and fixtures in the building.

Lighting projects/Electrical.

First floor corridor - All diffusers were replaced and donated to the school. This greatly-enhanced the lighting quality and are also aesthetically pleasing in comparison to the original diffusers.

Basement corridor - All light fixtures were replaced with new T8 fixtures. The light fixtures were donated to the school.

Electrical - Is continuous and ongoing do to the age of the facility.

Flooring Projects

Third Floor -All classroom wood floors were sanded and refinished with the exception of room 312, this room is tile over wood and is slated for rehab in the near future.

First Floor - Two classrooms were re-carpeted by vendor with the intention of sanding or carpeting the remaining rooms / offices over the summer.

Basement corridor - Floor was painted with a base coat and is slated for a final recoat over the upcoming break.

Plastering/Painting.

All major plaster work has been completed by vendor all minor work is currently being done in-house. Prep and painting of corridors is currently in process and will be completed in-house.

Outside Beautification and Repairs.

South West Playground - All cracks and potholes were filled and seal-coated.

South Parking Lot - All cracks were filled, potholes filled and patched.

Jungle Gym North-removed do to liability as it was unsafe. Options are currently being considered for the area.

Front of School
- Trees removed
- Bushes trimmed
- Trees trimmed on parkway
- New sod installed
- Entire area and trees mulched

 I would like to take this opportunity to acknowledge Rita, Maggie, Thom and Bob our Engineer and thank them for all their input, support and hard work with the ongoing beautification and improvement of our facility without which none of this is possible.

Thank You
Joe Agate

Exhibit G

Subject:	Head Start Parent Policy Meeting Action Items and Updates

---------- Forwarded message ---------
From: **Ebonie Townsend** <townsend.ebonie@gmail.com>
Date: Wed, Nov 7, 2018 at 1:37 PM
Subject: Head Start Parent Policy Meeting Action Items and Updates
To: Samara Akins <sakins@tmsoe.org>

Hi Ms. Samara,

We discovered two major barriers to parent involvement during our November Parent Policy Meeting —
parents want to volunteer but aren't clear about the process and parents simply aren't aware of our meetings and
volunteer opportunities. Head Start Parent, Natalie Noble, is willing to act as a Parent Volunteer Coordinator by
being responsible for distributing, promoting and collecting Volunteer Applications.

In an effort to raise awareness of meetings and opportunities, we propose the following ideas and suggestions:

- Parent Committee to pass out flyers at least one week in advance of meeting/event during Pick Up.
- Parent Committee to pass out flyers and engage with parents during Report Card Pick Up.
- Placing Meeting Reminder stickers on Head Start Report Cards.
- Flyers to be placed in backpacks of Head Start students.

December 14, 2018 Meeting Logistics

- Change meeting time to 3:15PM-4:00PM
- Change meeting location to Auditorium or bigger room as we anticipate increased attendance
- Catered by Krispys Chicken Wings
- Staff Volunteer Chaperone to monitor kids in separate room

Action Items
Approval for Parent Volunteer Coordinator position
Approval for our ideas to increase parent engagement
December 14 meeting logistics including room, catered food and a staff member to monitor children in separate
room

Please let me know if you have questions!

Thank you,

Ebonie
--
Samara Akins Rush
HeadStart Coordinator
The Montessori School Of Englewood

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(773) 535-9255