

HILL VIEW MONTESSORI CHARTER Public School

Annual Report 2016-2017 School Year



*"We discovered that education is not something which the teacher does,
but that it is a natural process which develops spontaneously in the human being."*

-Dr. Maria Montessori

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INTRODUCTION TO THE SCHOOL

Hill View Montessori Charter Public School			
Type of Charter	Commonwealth	Location of School	Haverhill, Massachusetts
Regional or Non-Regional	Non-Regional	Chartered Districts in Region (if applicable)	Haverhill
Year Opened	2004	Year(s) in which the Charter was Renewed (if applicable)	2008; 2014
Maximum Enrollment	306	Current Enrollment as of 6/20/2017	301
Chartered Grade Span	K-8	Current Grade Span	K-8
# of Instructional Days per school year	180	Students on Waitlist as of 6/20/2017	528
School Hours	8:20 am – 3:40 pm	Age of School as of 2016-2017 School Year	13 Years
<p>The Mission of Hill View Montessori Charter Public School is to provide a grade K-8 public education that promotes academic excellence using the Montessori philosophy. In partnership with teachers and parents, children attain high levels of academic, personal, and social achievement and so prepared, become constructive contributors to our community.</p>			

LETTER FROM THE CHAIR OF THE BOARD OF TRUSTEES

Dear Community,

The Hill View Montessori Charter Public School community made many accomplishments during the 2016-17 school year. With the strong guidance of highly trained and dedicated teachers and staff, our students progressed through a rigorous Montessori curriculum that prepares them not just for high school, but for life.

Our Executive Director and staff delivered this quality education on a budget that is primarily funded by state tuition. We appreciate the continued support of the Commonwealth's leadership and look forward to our work with the Department of Education.

The HVM annual lottery to select new students in February again attracted many more applicants than our school is able to accommodate. It continues to demonstrate the community's desire for strong, student centered programming. And, we graduated our seventh class of 8th graders in a moving ceremony attended by family, friends and alumni.

I want to thank all of the volunteers who contributed their time and effort this year toward making HVM the special place that it is. Our fundraising efforts, particularly the annual auction, the book fairs and our Community Partners (CP) events, would not occur without the help and support of a host of talented and energetic volunteers.

There were several very visible improvements to the school this year. Thanks to the dedication of local sculptor and parent, Dale Rogers, the front of the school has an exceptionally beautiful and meaningful sculpture – Star Dancers. Seventh grade students designed it with training and supervision from art teacher, Nicole Laponius, and Dale. The project, celebrated by local business and civic leaders, was funded by the Massachusetts Cultural Council's STARS grant. It is the fifth piece that the creative and generous sculptor has blessed us with.

Another volunteer, Susan Consoli Turner, headed the effort to beautify the front of the building, making it welcoming to all who enter. She planted flower gardens and installed a peace pole with one of Dale's red cardinals on top. Veteran and parent Natasha Young gifted the American Flag. The beautification fund also brought to our students two outstanding programs. The Handel and Haydn Society Vocal Quartet celebrated music from around the world. The second program celebrated leaders in peace through the eyes of nationally renowned artist, Rob Surette.

HVM received several generous grants and donations that supplement the tuition funding from the state. Notably, was a grant from the Demoulas Foundation to fund the building of a sports court. Modern Woodmen Financial also contributed to installing a new water fountain that will serve the playground.

Our year twelve site visit from the state reported a significant improvement in increasing staff's Montessori knowledge and alignment of classroom instructional methods to the Montessori educational philosophy. Academic progress in a majority of curriculum areas this year resulting in a trend that shows that as HVM students proceed through the grade levels, performance increases each year through to graduation. However, perhaps more satisfying than improvement in standardized score was the evaluators' description of what they saw in the classroom, "Classroom environments in all grade levels were conducive to learning and student engagement was consistently high during the large majority of classroom observations."

Consultant Sandra Wyner Andrews, using the Essential Elements of Successful Montessori Schools in the Public School Sector Rubric, Montessori Classroom Guidelines, and the Work Engagement Observation, performed the 2016 Montessori Audit. She was able to observe 22/25 essential elements. She would like to see a 4 year-old program, more Montessori administrative training and a Montessori curriculum leader. She saw children engaged in work demonstrating a strong culture of learning in all classrooms while working collaboratively as well as individually. Most often, students were using materials, the foundation of Montessori lessons, with care.

In furtherance of HVM's mission, HVM continues to demonstrate the commitment to the "whole child" with weekly Middle School Advisories and Project Groups to enhance both social/emotional and academic learning; 3-D printing opportunities to utilize STEM skills; and commitment to community service by each level, (Juniper's Blanding turtle release at Great Meadows National Wildlife Refuge, MS service days at Merrimack Valley Food Bank, and Cedar Room's Merrimack River Project Showcase at Salem Visitor's center, to name a few). Additionally, the Haverhill Rotary Club sponsored "EarlyAct Club" with a "Service Above Self" mission, mentored lower elementary students, worked at HeadStart, Salvation Army and participated in Boston's Walk For Hunger. Students at all grade levels enjoyed 'going outs' this year including 7th graders hiking in the White Mountains, a variety of classrooms visiting MIT, the Museum of Fine Arts, Y-Camps and Stone Zoo. Teachers and students presented two music concerts, an art show, talent show, Middle School play and several opportunities for after-school sports. Our boys' soccer team won the Haverhill Middle School Soccer Championship for 2017.

Summer maintenance and rehabilitation allowed us to begin our year anew. Challenges with facilities were abated this year through an ongoing building maintenance focus. As challenging as weather can be, HVM managed a minimum of school cancellation days. An amazing amount of site management ensures minimal disruption to education programming.

I am thankful to the wonderful teachers and staff who not only educate your children, but also provide them with the attention and respect they deserve. It has been my privilege to serve as the Board Chair this past year, helping our Executive Director, Jeanne Schultz, lead the wonderful community of Hill View Montessori, and working with the Board of Trustees to move forward with our Montessori mission.

Sincerely,

Stewart Lytle
Chair, Board of Trustees

SCHOOL PERFORMANCE AND PROGRAM IMPLEMENTATION

The following information and supporting data summarize Hill View Montessori Charter Public School (HVM)'s achievements during the 2016-2017 school year based on HVM's current accountability plan as well as the State's Common School Performance Criteria.

FAITHFULNESS TO THE CHARTER

MISSION AND KEY DESIGN ELEMENTS

The mission of Hill View Montessori Charter Public School is to provide a K-8 public education that promotes academic excellence using the Montessori philosophy. In partnership with teachers and parents, children attain high levels of academic, personal and social achievement and so prepared, become constructive contributors to our community.

Following are HVM's core values, which represent the heart of our mission and vision:

- Core Value 1: Preeminent Public Montessori*
- Core Value 2: Holistic Student Development*
- Core Value 3: School-Strengthening Collaboration*
- Core Value 4: High Quality Staff*

Core Value 1: Preeminent Public Montessori

The "Essential Elements of Successful Montessori School in the Public Sector", from the American Montessori Society, allows HVM to strive towards our goal of being a preeminent public Montessori school. A national Montessori consultant evaluates the Montessori program every two years (September 2016) on these elements, as follows with her recommendations in parentheses:

Montessori Teachers

- Employ Montessori teachers who have Montessori credentials for the levels they teach.
- Maintain an active and open recruitment for Montessori credentialed teachers.
- Budget for future Montessori teacher education for non-Montessori credentialed teachers.
- Provide professional Montessori in-service by experienced credentialed Montessori educators.
- Contract of on-going internal and periodic external Montessori consultation and/or professional support as a follow up to Montessori teacher education. (Suggests more Montessori support)
- Employ one paraprofessional per classroom, each having received Montessori orientation for that role.

Administration

- Employ an experienced Montessori teacher to serve as curriculum coordinator.
- Employ a building principal/educational leader who has knowledge of Montessori principles and curriculum through Montessori coursework, Montessori Administrator Credential and/or annual conference exposure. (Suggests the EPD take continuing course in Montessori philosophy and pedagogy)
- Maintain commitment to the core Montessori curriculum and instruction even with changes in administrative staff.

- Sustain the support of the central administration through high profile communications about program development.
- Recognize that the best implementation process is to begin with the 2.5-6 age group and add one age at a time for a gradual progression (Not Met due to funding)

Recruitment/Parent Education

- Provide Montessori parent education programs that promote understanding of Montessori principles and curriculum.
- Develop an admission process that informs parents about the nature of Montessori and seeks the necessary commitment to the program.

Curriculum/Environment

- Offer a full complement of Montessori materials purchased from authentic Montessori vendors.
- Develop a classroom design that is compatible with Montessori “prepared environment” principles.
- Create uninterrupted daily work periods of 90 minutes to 3 hours, considering the 3-hour work cycle as ideal.
- Integrate specialty programs (music, art, physical education, etc), around the uninterrupted work periods.
- Apply the appropriate multi-age groupings: 2.5-6, 6-9, 9-12, 12-15, 15-18 necessary for the diversity, flexibility, and reduced competition integral to Montessori. (Not Met – not 2.5-4 year olds)

Assessment

- Use a process of reporting student progress that is compatible with Montessori and includes parent conferences and authentic assessment tools such as observation, portfolio, performance assessment with rubric, etc.
- Implement state mandated assessments in such a way that the character of the Montessori program is not compromised.

Professional Development

- Budget for continuing education through Montessori workshops and conferences.
- Maintain membership with one or more of the professional Montessori organizations and seek Montessori accreditation to assure consistent quality.

In the Montessori audit, September 2016, Sandra Wyner observed 23/25 components of the Essential Elements. Additionally, the “Evaluation of Middle School Program in a Montessori Public School” showed that out of 45 criteria, our consultant saw that 31 were “In Place” and 8 were “Working On” and 12 were “not observed” but did not necessarily mean they were not present – only not observed when the consultant was here. To illustrate, out of seven criteria about students, 5 were observed as “In Place” and two were not present on that day.

Students:

- There is evidence of a student’s work displayed.
- Students are engaged in meaningful work.
- Students are taking pride in their work, its appearance being neat and orderly.
- Students are well mannered.
- Students are evaluating their work and that of their peers against a rubric or exemplar. (Not observed)
- Students are working collaboratively.
- There is evidence that students are engaged in learning outside of the classroom. (Not observed)

The audit demonstrated that the Montessori philosophy and curriculum exist in all classrooms. Currently, alignment charts document the blend of the Montessori and the Massachusetts Common Core Standards. HVM continued reading (DRA2 and DIBELS) and writing (Six-Traits) portfolio assessments during the 2016-17 school year. In addition, HVM continued to use the ScanTron Performance Series mathematics and English Language Arts assessment for grades 1-8, and 5th and 8th grade science as our district-determined measure.

The Data Team, facilitated by the Technology & Data Director, consisting of a cross-section of teachers and administrators, met monthly to analyze data and discuss efforts to improve the assessment of student learning and growth, while staying true to the Montessori learning approach. The Data Team is working with the new objectives and measures as part of the school's Accountability Plan. In support of the measures, new methods of data collection were identified and implemented. Online/electronic data collection of lesson plans, community service and progress reports allow for efficient data analysis for each measure. Data team also reviewed the latest trends in Montessori Progress Reports and did elect to move to a new format for Lower Elementary and Upper Elementary - with the express purpose of offering clarity to parent communications.

In the area of personal and social achievement, HVM's Grace and Courtesy Curriculum is also a model of preeminence. The focus on student's personal and social development is an important aspect of Montessori curriculum and is a focus of K-6 and Advisories in grades 7th and 8th. In addition to the quantitative data presented on progress reports, teachers collect anecdotal data that emphasizes student success. Additionally, the majority of visitors to HVM comment on the calm and peaceful nature of our classrooms. Guests are also amazed at how engaged and self-directed our students are even in the youngest grades. When our students spend time in the community on going-outs, community service and extracurricular school events, people comment about their positive and productive behavior.

The Haverhill Rotary Club sponsored Hill View Montessori's Middle School EarlyAct Club, stressing governance and community service training, "Service Above Self". Students visited and supported our local HeadStart program, worked at a food bank, walked in Boston's "Walk for Hunger", coordinated a Mitten Tree gathering gifts for the Department of Children and Families, and sponsored a winter coat drive in the fall. They also mentored students in Kindergarten and Lower Elementary throughout the 2016-17 school year.

Core Value 2: Holistic Student Development

HVM is committed to the development of the whole child and believes that it is necessary to provide a holistic approach to a child's education. Without feeling safe, understood, valued and able to make and grow from mistakes, children may learn skills but will not reach their full potential as critical thinkers and competent problem solvers. Parents, on the 2017 Parent Survey, agreed that their children were provided opportunities to develop critical thinking skills and creative problem solving skills, 87.5% and 84%, respectively. On average, only 4.5% disagreed with these criteria.

Kindergarten, under teacher Mary Lytle's guidance, participates in a year-long study of Schools of Art, great artists, and their most known paintings alongside their Practical Life, Sensorial, Language and Math lessons. Student engagement in the classroom project includes stories about artists lives; study of genres; and technical skills in painting i.e. pointillism, impressionism, modern art, etc. Students practice repetitive recall in the game, "Who Am I?" with statements such as "I painted with candles on my head. Who am I?" and created a portfolio of eight famous paintings.

The Middle School program, in planning for the "whole child", conducts Project Groups in a two-hour block each week. Students choose the project they wish to participate in: Theater Arts, Community Canvas, MS Quilters, Genius Squad, STEM, Model Building, Arts of Expression, Rotary EarlyAct Club and Model United Nations. Each project has a research component, hands-on activities and presentation. For example, the Massachusetts Cultural Council's STARS grant involved students from Community Canvas, Arts of Expression and Genius Squad.

The Montessori learning environment promotes 21st century skills such as self-direction, teamwork, critical thinking and problem solving skills in addition to students knowing themselves as learners. Students are involved in Practical Life activities that include care of themselves and their environment. Students at HVM are empowered to take ownership of their learning and their environment with the guidance of their teachers.

Core Value 3: School-Strengthening Collaboration

Parental and community involvement continues to be an important aspect of HVM. Due to the generous support of volunteers, HVM is able to stretch its limited resources and serve its students beyond what would be possible otherwise. Volunteers take on a variety of roles including serving on committees, doing projects to maintain the grounds and building, keeping up the library, making classroom materials, driving for student outings, and mentoring students. During the summer of 2016, parents helped both monetarily and through in-kind services to physically create an additional Lower Elementary classroom.

When funding for an out-of-school Field Day was not available, parents, with Community Partners volunteers, facilitated Field Day activities, planned with the principal and teachers. One parent took on the responsibility of “beautification” of the grounds by facilitating a fundraiser, then planting two lovely gardens at the entrance to the school. She designed a peace pole that is incorporated into the sculpture garden. Another friend of the school cleared shrubs, leaves and debris from the front island.

Additionally, Nicole Laponius, the art teacher, and her Creative Canvas Middle School group, working with a Mass Cultural Council Grant and sculptor, Dale Rogers, Jr., created a nine foot “Star Dancer” sculpture that welcomes our students, parents and community to HVM. It stands proudly along with four other of his donated sculptures standing proudly throughout the grounds. Creative Canvas also painted trees outside each of the classroom entrances to honor the classroom tree names, i.e. Maple, Oak, Ginkgo, etc. An effort to construct a sports court and outdoor classroom are still on the drawing board, as fundraising activities are on going.

Hill View Montessori continues to donate milk, juice, and fruit to Emmaus, a homeless shelter non-profit, reaching out to many Haverhill residents with employment training, education, and assistance with affordable housing.

Core Value 4: High Quality Staff

As stated in the Montessori audit, HVM’s K-6 teachers are all Montessori credentialed and one teacher has his Adolescent Montessori Certification for Middle School aged students, 12-14. HVM continues to be committed to employing teachers with Montessori training who also meet federal standards for high quality teachers.

We continue to support teachers who want to pursue their Montessori credentials, and who need additional funding sources to support this goal. In 2011, a scholarship program was developed to help teachers obtain their Montessori credentials through Seacoast Montessori training and recently with the Montessori Elementary Teacher Training Collaborative in Lexington, MA; six teachers were involved in this program. The FY17 budget set aside funds to support this program.

Three teachers completed their Masters Degree, and three teachers earned their Montessori Certification. The Middle School Special Education teacher completed both her internship and earned state certification in December. The goal is to ensure all lead teachers are fully competent and trained in both Montessori philosophy and Massachusetts teaching requirements.

Upper Elementary Teacher, Germaine Koomen, was awarded the “Secretary’s Awards for Excellence in Energy and Environmental Education”, May 8, 2017 by Matthew A. Beaton, Secretary, Executive Office of Energy and Environmental Affairs. Thirty schools were honored. She has participated both individually and with her students in the following programs and grants:

- Alexandria Training – AMI Montessori sponsored cultural studies unit
- Connect Science Energy Program with University of Virginia and J. Harkins – place based community service learning pilot program. HVM acknowledged in training manual

- GEM’s Science Grant – secured a three-year grant for training at Worcester Polytechnic Institute. Open to all teachers during summer on a voluntary basis.
- National Science Foundation STEAM curriculum – She piloted curriculum on Artificial Intelligence written by Smith College and Springfield Technical Institute based upon the book, Through My Window. Author Sonia Ellis presented to the class. Curriculum uses story to integrate STEM and literacy to frame engineering in innovative ways.
- MSSEF – “Curious Minds Initiative” provides a year-long consultant to help teachers prepare for a Science Fair.
- Salem Coastal Sound Watch – partnership for cultural studies

The Juniper lower Elementary classroom, for the third year, participated in the Blanding’s Turtle “HeadStart” program. Blanding’s turtles are a threatened species in Massachusetts, and the Juniper classroom adopted two hatchlings in November. The students have been working with the Grassroots Wildlife Conservation to raise the hatchlings until they are large enough to be released into their native habitat in June. Juvenile turtles that have been started in this program survive and thrive at high rates after their release, enabling the Blanding’s turtle population to eventually recover in Massachusetts.

The Walnut classroom, Lower Elementary, partnered with Haverhill’s Buttonwoods Museum with visits to study local history and participation in the Festival of Trees.

AMENDMENTS TO THE CHARTER

There were no amendments to the charter during the 2016-2017 school year.

DISSEMINATION EFFORTS

Best Practice Shared	Vehicle for Dissemination (describe the method, format, or venue used to share best practices)	Who at the school was involved with the dissemination efforts? (Title)	Criteria that best aligns to the shared best practice (see list below)	With whom did the school disseminate its best practices? (Partners and Locations)	Result of dissemination (List any resulting artifacts, materials, agendas, or results from partners. Also indicate if the school received grant funding to disseminate and if a grant report was written.)
Montessori Math / Common Core Math	School Visits On-site PD x 2	Principal, K-6 faculty, some Instructional Assistants, Math Curriculum Director from Tobin Montessori	Curriculum and Instruction	Shared experience with Tobin Montessori, within Cambridge Public Schools.	Shared experience: Montessori integration into Common Core: how best to implement Common Core Mathematics without compromising Montessori pedagogy
Care and identification of trees (environmental education)	Upper Elementary Cedar Room	G. Koomen, S. Parker, UE students, Jeff Esche, Tree environmentalist	Curriculum and Instruction	Essex Heritage , Salem, MA – presentation by teacher and students	Planted trees on HVM property. Jeff held weekly meetings with Cedar students on tree identification and care.

Communities of Practice – MHVMA Capacity Building Network	Collaborative meetings with Charter School Administrators and MHVMA facilitators	Principal SpEd Director	School Leadership, Support for Diverse Learners	Shared with Charter Schools across the state	Problem solving and continued representation in PBIS Model Schools project – 2 nd year
Science from Scientists	Site Visit	Principal and UE teacher	Curriculum and Instruction	Science from Scientists: two scientists taught a class on supply and demand ecosystems at Tilton school. Tilton teacher and our UE collaborating on grant writing to bring project to HVM.	To improve the attitudes and aptitudes of 4 th through 8 th grade students in Science, Technology, Engineering and Mathematics to ensure that students are competitive globally. UE teacher trying to secure grant.
Energy project collaboration with “Park for Every Classroom”, Northeast Urban Forest Advocacy and Covanta, energy corporation	Presentation and showcase of project	UE teacher and students	Curriculum and Instruction	Presented at Salem National Park Visitors Center, And at Essex Heritage “Park for Every Classroom”, Germaine teaching a two day training course for “Park for Every Classroom”	Innovative Stem project involving literature, interactive computer dialogue, activities and discussion
Collaboration between principals and faculty	Site Visits	Five-ten faculty from each school did site visits	Key Design Elements	River Valley Charter School and HVM	Classroom observations to compare two Montessori programs for similarities and differences
Pedagogy	Early Childhood Practicum – five months	Both Kindergarten teachers and classrooms	Key Design Elements, Curriculum and Instruction, Social Emotional	Northern Essex Community College Early Childhood program	Students completed practicum credits for graduation
School Nursing Practice	Two-day practicum	HVM school nurse	Social Emotional Health Needs	Middlesex Community College Bedford MA	Introduction to nursing practices in a K-8

Proactive Alternatives for Change (PAC)	Training full course, plus 2 hour recertification			Mass Department of Developmental Services	Certification for individuals outside of education, from across the state. Educates parents about HVM's and state regulations for Special Education.
Insight Tours	Building tour, student presentation of Montessori practice	Board of Trustees representative	Mission and Key Elements	Open to public, community business partners, prospective parents	Dissemination of our Montessori Charter Public School's program and pedagogy
Charter business practices	Conference presentation	Business Manager	Finance and Facilities	Association of Business Officials International	Networking with national colleagues on best practices in Charter School Management

ACADEMIC PROGRAM SUCCESS

STUDENT PERFORMANCE

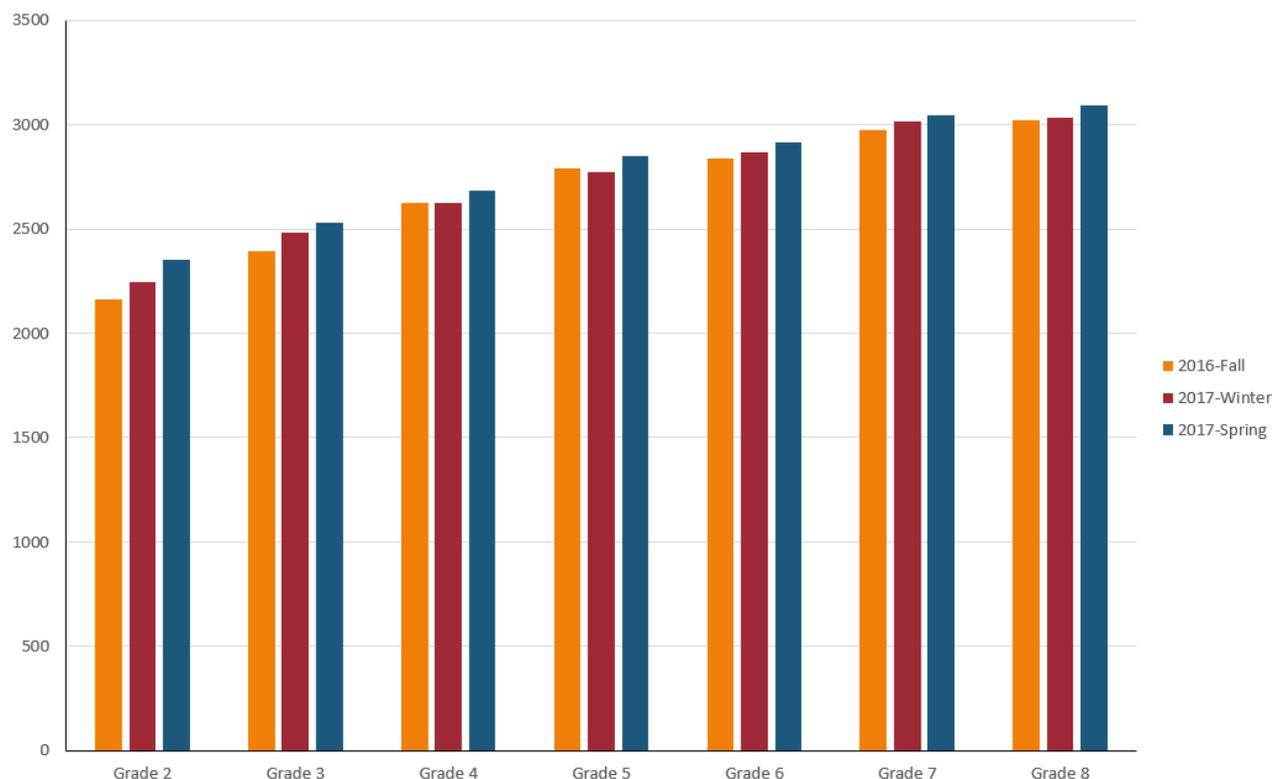
The Hill View Montessori Charter Public School's school report card can be viewed at:

<http://profiles.doe.mass.edu/reportcard/rc.aspx?linkid=37&orgcode=04550050&fycode=2016&orgtypecode=6&>

HVM has been using the ScanTron Performance Series adaptive computerized assessment to measure proficiency level since 2014. This assessment has allowed to measure student growth and identify areas of opportunity for instruction and curriculum enhancement.

For the 2016-2017 school year, the reading assessment in ScanTron Performance Series showed overall school wide increases of **2.8%** from Fall 2016 to Spring 2017. This assessment measures student performance at their grade level in Vocabulary, Long Passage, Fiction, Non-Fiction. In addition, it provides a Lexile reading rate and grade level comparison. Please refer to the chart below for a comparison of Fall, Winter and Spring Reading Scaled Score by Grade Level in Reading.

2016-2017 ScanTron Reading Scaled Score by Grade



Lower Elementary students showed a steady reading growth in grade 2 (8.2%) and grade 3 (5.4%) respectfully.

Grade	2016-Fall	2017-Winter	2017-Spring	PCT increase Fall to Spring
2	2160	2244	2352	8.2%
3	2392	2482	2529	5.4%

Upper Elementary students demonstrated a growth in grade 4 (2.3%), grade 5 (2.1%), and grade 6 (2.7%) from the Fall to Spring on the ScanTron Reading Assessment.

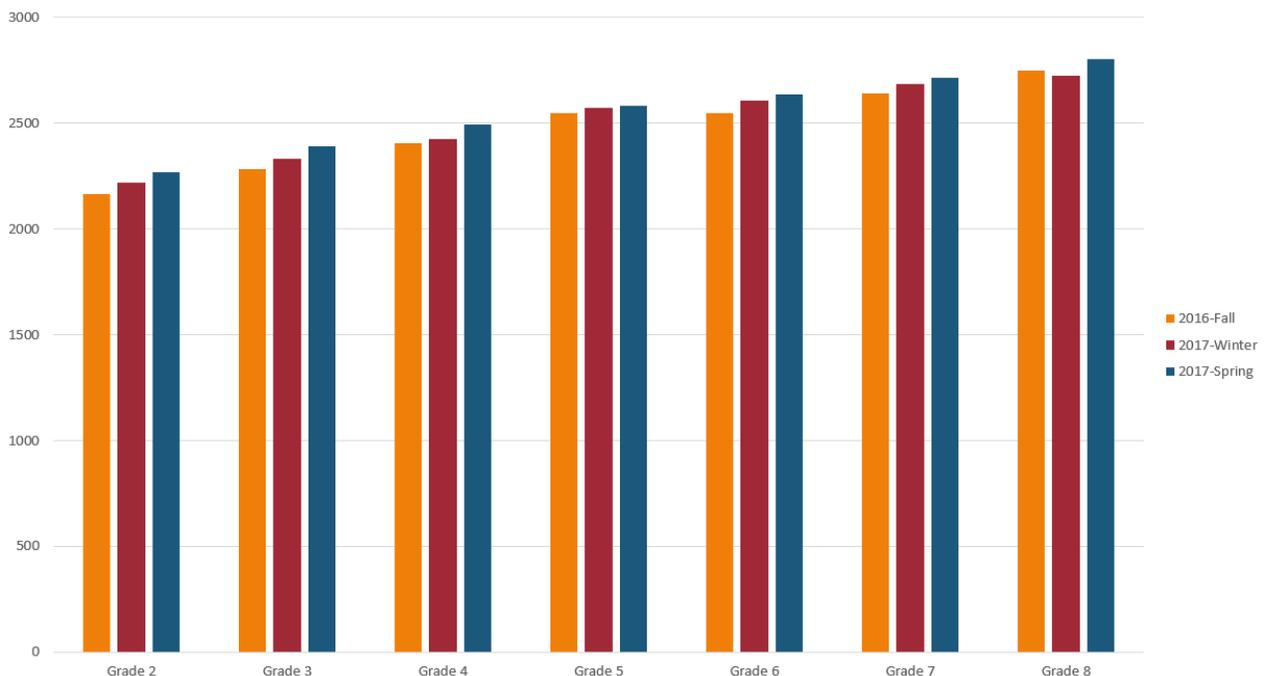
Grade	2016-Fall	2017-Winter	2017-Spring	PCT increase Fall to Spring
4	2624	2626	2685	2.3%
5	2789	2772	2849	2.1%
6	2836	2869	2914	2.7%

The middle school students in grades 7 and 8 showed progress in the ScanTron Reading Assessment.

Grade	2016-Fall	2017-Winter	2017-Spring	PCT increase Fall to Spring
7	2971	3014	2047	2.5%
8	3024	3036	3093	2.2%

For the 2016-2017 school year, the math assessment in ScanTron Performance Series showed overall school wide increase of **3.0%** from Fall 2016 to Spring 2017. This assessment measures student performance at their grade level in Numbers & Operations, Measurement, Data Analysis & Probability, Geometry and Algebra. Please refer to the chart below for a comparison of Fall, Winter and Spring Scaled Score by Grade Level in Mathematics.

2016-2017 ScanTron Mathematics Scaled Score by Grade



Lower Elementary students showed a steady Math growth in grade 2 (4.6%) and grade 3 (4.6%) respectfully.

Grade	2016-Fall	2017-Winter	2017-Spring	PCT increase Fall to Spring
2	2162	2220	2266	4.6%
3	2280	2332	2389	4.6%

Upper Elementary students demonstrated a steady growth in grade 4 (3.5%), grade 5 (1.5%), and grade 6 (3.3%) from the Fall to Spring on the ScanTron Math Assessment.

Grade	2016-Fall	2017-Winter	2017-Spring	PCT increase Fall to Spring
4	2405	2426	2491	3.5%
5	2545	2571	2583	1.5%
6	2547	2606	2634	3.3%

The middle school students showed growth in grade 7 (2.7%) and grade 8 (1.9%) from the Fall to Spring ScanTron Math Assessment.

Grade	2016-Fall	2017-Winter	2017-Spring	PCT increase Fall to Spring
7	2641	2684	2713	2.7%
8	2748	2723	2801	1.9%

PROGRAM DELIVERY

In November 2016, Chip DeLorenzo, M.Ed., CPDT presented a professional development session for all HVM staff members on the Montessori topic, “Breaking the Cycle”, uncovering the roots of misbehavior. The professional development focused on teams of teachers working collaboratively on: (1) identifying the root causes behind the behavior; (2) responding to the child’s chronic behavior in a manner that is both proactive and consistent with the Montessori philosophy of respect, and (3) using effective and respectful discipline tools that help children connect to their classroom community.

In September 2016, Ms. Sandra Wyner, a nationally known Montessori consultant, observed classrooms and met with Lower Elementary teachers to develop Montessori instructional goals. She returned in the spring to again observe and collaborate on their goals. In addition, a Montessori coach provided a 2-day support service for one of our new Montessori teachers.

Joanne Cleary, the Math Coach and Title I Math Interventionist at Tobin Montessori School in Cambridge, MA, provided two (2) professional development sessions at HVM describing how the Math Common Core standards could be integrated into the Montessori curriculum and instructional methods. January's session focused on understanding how the Mathematical Practice Standards could be fully incorporated into Montessori lessons without compromising authentic Montessori practice. Lessons will continue to promote high levels of student achievement, and will bring coherence to the interpretation and implementation of the CCSS as they relate to the Montessori Math and Geometry Lessons. The May Professional Development session reviewed the faculty’s success on the assigned curricular tasks. Teachers assessed Montessori lessons that were rewritten specifically incorporating the Standards for Mathematical Practice. Time was also spent on thinking about the Common Core Progressions for Numbers and Operations in Base 10 and revising that document with references to specific Montessori Lessons in their albums.

In addition, through our Title I Grant, HVM was able to implement a weekly math intervention program focusing on upper elementary students applying both problem solving and math writing strategies to their preparation for the MCAS II assessments. Maria Bridges, a teacher with mathematics background, worked collaboratively with each upper elementary teacher to develop lessons and strategies to meet the specific needs of students in each classroom.

A language-based program was implemented to meet the unique needs of select special education students. The class is designed to support development of language and learning skills, including reading, writing, spelling, oral expression and vocabulary. Oral and written language remediation was provided through integrated curriculum to reinforce the relationship between listening, speaking, reading, and writing for students. The language-based class challenges students, while effectively providing the constructive and practical support to meet those challenges. HVM strives to empower students to become independent learners and develop appropriate skills to function successfully back into the classroom.

HVM continues to collaborate with the Massachusetts Charter Public School Association in the Model School program promoting and empowering our school to develop positive behavior strategies that supplements our Montessori Social/Emotional curriculum - Grace, Courtesy & Respect. Dr. Kristy Park and Michelle Lomas of the MHVMA have provided professional development for both the lower and upper elementary teachers and their instructional assistants. They observed classrooms and followed up with teachers to discuss and problem solve around students' common barriers to learning and classroom behavioral supports.

Our Technology Director and School Social Worker attended ALICE Training sessions to certify as ALICE trainers for school employees. ALICE (Alert, Lockdown, Inform, Counter, Evacuate) is a training program preparing for armed intruder events. The goal of ALICE is to provide response options and increase survival rates. Our Trainers provided professional development in the understanding and implementation of action against intruders in our building. Another professional development session included officers from the Haverhill Police Department presenting a PowerPoint presentation on Law Enforcement Procedures and Protocols regarding lockdown situations at schools. Staff participated in traditional lockdown, enhanced lockdown, evacuation, and counter activity drills monitored by the officers and our ALICE Trainers.

The Administrative Team participated in a professional development session with Attorney Andrea Bell focusing on parent complaints, investigative procedures, interview techniques, record keeping, and timelines.

Other professional development for the staff included PAC De-escalation Review, Civil Rights Training, Special Education Regulations, Crisis Training, and Bullying Prevention and Intervention protocols and procedures.

HVM educators work collaboratively to assess students' academic needs through observations, work samples, school-wide assessments such as DIBELS Reading, DRA Reading Comprehension, writing portfolios, and ScanTron Performance Series. In addition to the above data, statewide assessment data (PARC ELA & Math, MCAS-Science) was also analyzed to monitor the academic growth of students. HVM classroom teachers and support teachers used strategies which focused on reading comprehension, vocabulary building, writing skills, especially in reference to open ended questions in content areas of ELA and mathematics. Teachers utilize ScanTron and DRA data to create reading groups and to provide individualized and group instruction in reading comprehension.

HVM teachers incorporate the Six Traits Writing Program into their Montessori writing lessons to strengthen the student's writing conventions, organization, word choice, ideas, sentence fluency and voice. Rubrics are used to self-evaluate and assess their writing. Through this program as well as the Montessori grammar lessons, the student is able to develop a strong foundation for written expression.

The Energy Project in Germaine Koomen's classroom combined the attributes of social responsibility, community partnerships, place-based learning, science, and history. The use of service learning provided opportunities for

student initiative and ownership as well as opportunities for students to develop as engaged citizens.

The twenty-four students in this class learned about energy, renewable/nonrenewable energy sources, and how an electric circuit works, and applied this knowledge to the needs of our school and community. They completed an energy audit of the classroom and voted on whether they would prefer to upgrade the lighting and drafty windows, convince the school to mandate new energy policies, or directly educate the community. After interviewing the school's business manager and custodian, they learned that direct action was not feasible. Based on this information, they decided to create a program to educate the community on energy conservation. Although the program is based in one classroom, its goal is to reach the entire student and parent body.

The program is based upon the Connect Science curriculum, which is being developed by the University of Virginia & Harkins Consulting with funds from the U.S. Department of Education. They provided free materials, training and coaching. Additionally, the Parks for Every Classroom program, a program developed by the National Parks Service and Essex National Heritage Commission, provided training materials and coaching.

Germaine's class used this information as a launching point to extend the energy project to the history and biology of the Merrimack Valley. Students worked with Jeff Esche, Northeastern Urban Forestry Advocacy, to create an inventory of the trees on the school property and calculate the energy savings they provide. Student volunteers chose to extend this program to survey trees on their own properties. Under Jeff's guidance they established a school Tree Committee and learned civic participation by researching, advocating and actively caring for trees on our school grounds.

The class also partnered with the Covanta Energy Corporation to see how waste can be turned into an energy source. National Grid provided educational material. Germaine benefited from the advice and visits of Maryann Zujewski, a National Parks Ranger, and Beth Beringer of the Essex National Heritage Commission. The project culminated in a student-led Energy Carnival held in March. Students created a diverse range of exhibits including light circuits, energy saving light bulbs, millworkers, renewable/nonrenewable energy, models of solar, wind and hydropower generators, and the oxygen producing benefits of trees. They are citizen scientists and advocates for their communities.

This program was awarded the Secretary's Award for Excellence in Energy and Environmental Education by the Commonwealth. Several students joined Germaine in accepting the award on behalf of the class at the State House. These students published an article in HVM's weekly Wednesday Notes, our weekly parent communication describing their visit to the State House in Boston.

HVM's Teacher Assistance Team (TAT), meets at the teacher's request regarding student academic or social/emotional issues in their classroom. Upon review of the classroom observations, work samples, and available class data, the team is able to analyze and develop intervention strategies. Classroom teachers make modifications to the classroom environment and/or their instructional methods to accommodate the needs of the child. The TAT team monitors the progress of students every 6-8 weeks throughout the school year. If, after these interventions, the child still not making progress, he/she may be referred for Title I support, support from the school social worker or other in school support.

During the 2016-2017 school year, thirteen (13) students were referred to the TAT process, representing approximately 5% of our school population. Some of this data is used to identify students for services in Title I Reading and/or Title I Math program and after school PARCC tutoring sessions. Progress monitoring of students in intervention programs was documented approximately every six weeks. Ongoing data is used to arrange reading groups, teach particular grammar skills, vocabulary skills, comprehension, and problem solving strategies.

If the student continues to struggle, the student may be referred for Special Education evaluation in the area(s) of the suspected disability. When a student is eligible for special education services, this placement and services he/she receives are written into the student's Individualized Education Plan (IEP), as mandated by the Individual with Disabilities Act (IDEA).

The Director of Special Learning Services is responsible for facilitating all initial, annual, and reevaluation IEP meetings for students in grades K-8. Currently, supports approximately 60 students on IEPs and 504 Plans. She supervises three (3) special education teachers in the lower elementary, upper elementary, and middle school. Each teacher manages a caseload of approximately 15-18 students within their level. They are responsible for developing annual goals and objectives, implementing the service delivery, and writing progress reports each trimester. The school social worker and/or nurse is responsible for writing and implementing the 504 Plans. In addition, a part-time school psychologist and speech and language therapist assess and deliver services to students. contracts outside services for those students in need of physical therapy and occupational therapy.

Our Education Program Director/Principal is also the ELL and Title I Coordinator for the school. In this capacity, she oversees the Title I program and ELL program. The ELL teacher implements and monitors academic progress of eight (8) students in grades 2-8. The results of the ACCESS for ELLs WIDA report indicated consistent progress with many ELL students meeting proficiency levels between 3-6 in the Listening, Speaking, Reading, and Writing Language domains. The Title I program offers intervention in reading and math for students at any grade level to support deficits of need and support teachers in the classroom setting. Three Title I teachers provide reading and math support to children in the lower elementary, upper elementary and middle school. They work closely with the classroom teachers to bridge and reinforce the skills and strategies taught in the classroom. In addition, they work with small groups of student to hone in on specific reading and math deficiencies. This year, approximately 45 students received some level of Title I service in the area of reading and/or math. Approximately 93% of our classroom teachers have completed the RETELL Sheltered English Immersion course.

SOCIAL, EMOTIONAL, AND HEALTH NEEDS

HVM employs a full time Registered Nurse and a full time Social Worker/School Counselor. The Nurse and Social Worker partner with the administration and Special Education faculty to assess student needs and provide services that are comprehensive and individualized. This health team works closely with outside medical, mental health, and other service providers and parents to ensure each student received the services needed in order for them to fully participate in school and access the curriculum.

Prior to entry to school, each new family meets with the school nurse for a comprehensive developmental and health screening. Parents that identify social or emotional concerns are referred to the Social Worker and, if needed, to the Special Education Department. Entering Kindergarten students are also given a developmental screening to identify any concerns for future evaluation.

The School Nurse performs mandated annual health assessments including vision, hearing, height, weight, BMI, and posture screenings. Referrals are sent to parents when a follow up is recommended. An annual immunization survey is also completed to ensure students are up to date on all school-required vaccinations or has proper documentation for any exemptions.

The nurse teaches a Health and Wellness program for the 7th and 8th grade students. She developed lessons suitable for each age group in the areas of Nutrition and Fitness, Healthy Relationships, Substance Use Prevention, and prevention and early detection of skin cancer (Melanoma).

Students are serviced through IEP's, 504 Accommodation Plans, and Individualized Healthcare Plans. In addition to nursing and social/emotional services, students may receive Occupational, Physical, and Speech and Language services depending on the needs that are identified through the evaluation process.

In addition, a part time school psychologist completes evaluations and serves on the Special Services Team to participate in the development of Individual Education Plans.

The Athletic Director provides Morning Movement for students in K and Lower Elementary that consists of physical activities to enhance the readiness and focus for learning. Adaptive PE is also provided per IEP. The AD works closely with the Social Worker to provide a leadership club for upper elementary students.

ORGANIZATIONAL VIABILITY

ORGANIZATIONAL STRUCTURE OF THE SCHOOL

The organizational structure of Hill View Montessori Charter Public School did not change during the 2016-2017 year.

TEACHER EVALUATION

The cumulative process in the teacher evaluations comes from a combination of Montessori Work Engagement Observations and the Department of Elementary and Secondary Education Evaluation procedures. The Montessori Engagement Observation reviews the students' engagement in their work, materials used in lessons and individual work, observation of the prepared environment, classroom management, teacher relating to the child, presentations, and teacher's responsibilities regarding the implementation of Montessori methodology and philosophy. Overall observations should demonstrate the teacher's ability to form a positive Montessori community and a successful learning environment for their students.

The format of the Department of Elementary and Secondary Education (DESE) reflects four categories: "Curriculum, Planning, and Assessment", "Teaching to all Students", "Family and Community Engagement", and "Professional Culture". In the area of "Curriculum, Planning, and Assessment", observation is focused on professional knowledge, well-structured lessons, variety of assessments methods, analysis and conclusions, and adjusting instruction to meet the individual needs of students. "Teaching to all Students" focuses on: student engagement, meeting diverse needs, a safe and collaborative learning environment, clear expectations. "Family and Community Engagement" focuses on: teacher and parent/family engagement, providing learning expectations and student support, and communication between teacher and family. Lastly, the "Professional Culture" category focuses on the teacher's reflective practices, goal setting, professional learning and growth, professional collaboration, decision-making, and reliability and responsibility. It is with the guidance of the Montessori Observation Evaluation Work Engagement form that facilitates the use of DESE Formative and/or Summative written evaluation tool used for all teachers.

BUDGET AND FINANCE

Unaudited FY17 statement of revenues, expenses, and changes in net assets (income statement)

See Income Statement in the Attachments section of this report.

Statement of net assets for FY17 (balance sheet)

See Balance Sheet in the Attachments section of this report.

Approved School Budget for FY18

See Budget in the Attachments section of this report

Capital Plan for FY18

The HVM Foundation purchased a building at 75 Foundation Avenue Haverhill, Massachusetts in November 2009 and then signed a long-term lease with HVM for use of 49,000 square feet for school operations.

Please refer to the Balance Sheet and FY 2018 Budget for specifics on the capital reserve balance and projected expenses.

HVM does not presently have a Capital Plan for FY18.

APPENDIX A – ACCOUNTABILITY PLAN PERFORMANCE

	2016-2017 Performance	Evidence
Objective: provides a public Montessori education for grades K-8.		
Measure: The Five Great Lessons, the foundation of Montessori education, (The Coming of the Universe and Earth; The Coming of Life; The Coming of Human Beings; The History of Writing; The Story of Numbers) will be presented and built upon during the Lower Elementary, Upper Elementary and Middle School years. Yearly documentation will be collected.	Met	All levels of (K, LE, UE, MS) have presented the appropriate Great Lessons to students. Not all lessons will be presented in a single school year, due to the 3-year cycle of Montessori education. The lessons will continue at each level to ensure all students participate in all lessons during their K-8 education at HVM.
Measure: An outside Montessori consultant will conduct an audit every two years (2014-2015, 2016-2017) to evaluate 's program based upon the <i>Essential Elements of Successful Montessori Schools in the Public Sector</i> , developed by the American Montessori Society.	Met	In September 2016, Sandra Wyner Andrew from New View Montessori Consultancy completed a comprehensive audit of HVM. The Montessori Audit Report was reviewed by Administration, Faculty and Board and appropriate action items identified.
Measure: On the biannual audit, HVM will meet 90% or 20/22 of the Essential elements of the Essential Elements of Successful Montessori Schools in the Public Sector. Recommendations suggested will be addressed in an action plan to be completed during the following 2 years.	Met	The September 2016 audit used the latest Essential Elements of Successful Montessori Schools in the Public Sector rubric which now contains 23 elements. met 20 of the 23 essential elements in the audit. The items identified as needing improvement includes Specials, ELL/SPED, Practical Life and Montessori training of school leadership.
Measure: The Montessori curriculum and methods will be aligned to Common Core State Standards.	Met	Curriculum continues to be mapped to Common Core.
Objective: will focus on holistic student development.		
Measure: At least 85% of students will demonstrate "consistency" or "progressing" for grades K-6 and "3, or 4" for middle school on the Personal and Social Growth and Work Habits section of the end-of-year progress report.	Met	On the Spring 2017 progress reports, K-8 students in aggregate 86% of the time demonstrated consistent/progressing measures on the Social Growth and Work Habits section.
Measure: Annually, each K-6 classroom will participate in at least one community service partnership and/or project and each Middle School student will complete 20 community service hours.	Not Met	Projects included MSPCA and Emmaus House fundraising, Northeast Urban Forest Advocacy tree categorizing, raising turtles for Grassroots Wildlife Conservation, food and clothing drives and environment clean-up. Not all classrooms were able to participate in a partnership during the school year.

<p>Measure: HVM will present Montessori information to parents and/or community in a variety of formats and media, in order to integrate the Montessori philosophy into family life.</p>	<p>Met</p>	<p>Monthly academic newsletter from HVM includes a variety of articles explaining Montessori philosophy. In addition, Montessori-related materials are shared to the community in a variety of social media campaigns and on-site events.</p>
<p>Objective: Grace and Courtesy values are at the core of a Montessori education.</p>		
<p>Measure: A Montessori Grace and Courtesy theme is presented through curriculum, assembly, community-building and at-home activities.</p>	<p>Not Met</p>	<p>This will be revisited in the 2017-2018 school year. While information was shared in the monthly newsletter, a more formal curriculum with at-home activities will be implemented in the 2017-2018 school year.</p>
<p>Measure: HVM will decrease our behavioral referrals over the term of the charter comparing annual results.</p>	<p>Met</p>	<p>This goal is based on the overall term of the charter (2014-2019). As of the first two years of the charter period, HVM had 10 incidents in 2014-2015 which required internal or external detentions or suspensions. For the 2015-2016 year, HVM had 12 incidents resulting in internal or external suspensions. For the 2016-2017 year, 5 incidents resulted in internal or external suspensions.</p>
<p>Objective: will disseminate Montessori methods.</p>		
<p>Measure: Invite other public schools in the district to HVM-hosted Montessori Professional Development at least once per year over the term of the charter.</p>	<p>Met</p>	<p>HVM has reached out to the local district regarding sharing cultural and science lessons. Staff attended the Tilton science program this year with anticipation of collaboration in the upcoming school year.</p>
<p>Objective: will create an environment in which students will thrive socially, emotionally and academically, the “whole child.”</p>		
<p>Measure: HVM will become a Model Demonstration School for “Building Capacity to Serve All Students”, developed by Massachusetts Charter Public School Association and funded by DESE, and will host other schools to share our model over the charter term.</p> <p>This program provides coaching and professional development for schools to use to create and/or refine programs to support students with high-needs. By creating a positive school culture and integrating available behavioral resources, schools can affect the learning environment for general education, special education and high needs students.</p>	<p>In Progress</p>	<p>HVM continues to participate in the MA Charter Public School Association’s PBIS (Positive Behavior Intervention System) monthly program meetings during the 2016-2017 school year.</p>

APPENDIX B – RECRUITMENT AND RETENTION PLAN

Recruitment Plan 2017-2018

School Name: Hill View Montessori Charter Public School

2016-2017 Implementation Summary:

- 1) Our team was able to complete the components of the recruitment plan. We had three times the applicants as we had Kindergarten openings. Using these strategies, our Hispanic or Latino population was 21% for 16-17's Kindergarten class. Challenges include the expense of advertising and parents' concerns about the change in regulation that has them enrolling each year for the opportunity to participate in the lottery.
- 2) HVM has a large number of siblings who are included in the subgroupings on our district profile. Percentages differ from the previous year (due to names drawn in the lottery): High needs - 12%, African American/Black- 12%, Hispanic -21%, and white -62%.
- 3) The Special Education population was 14.7% for 2016-17. The official Chart data does not indicate this because of a technical error in our data that did not get resolved. Our Technology Director made Chart aware. HVM's percentage is higher than the CI (Comparison Index) for Special Education students.

Describe the school's general recruitment activities, i.e. those intended to reach all students.

General Recruitment Activities for 2017-2018:

Our general recruitment strategies are to:

- Advertise
- Hold Information nights
- Put information on the school's website
- Include in Wednesday Notes weekly newsletter

Recruitment Plan –Strategies

List strategies for recruitment activities for each demographic group.

Special education students/students with disabilities

(b) 2016-2017 Strategies

- Met GNT/CI: no enhanced/additional strategies needed
 - ❖ Provide indication of special education services on the school’s website.
 - ❖ Include specific and direct special education information with the school’s enrollment materials.
 - ❖ All recruitment materials state explicitly in the languages spoken by the families that “children with special needs are welcome at our school.”
 - ❖ The Special Education Coordinator will collaborate with the Elementary School principal to provide information to kindergarten applicants with information regarding the school’s special education program.
 - ❖ Special Education Director will attend a Haverhill Parent District Council meeting.
 - ❖ Share SEPAC meeting times and dates with HPs Parent District Council.
 - ❖ Connect with Haverhill based tutoring service organizations with advertising materials.
 - ❖ At the December 13th, 2017 and the January 19, 2018 Information Sessions, the school’s Special Education Coordinator and staff present to families and are available for individual consultations and to describe school resources to serve student needs. (yearly)
 - ❖ Deliver fliers to over 40 organizations

(a) CHART data

School percentage:
14.7%
GNT percentage: N/A
CI percentage: 14%

The school is below
GNT percentages and
above CI percentages

(c) 2017-2018 Additional Strategy(ies), if needed

- Did not meet GNT/CI: additional and/or enhanced strategies needed. Include the time allotted for each strategy for data change (i.e. 2-3 years, 1 year) and/or if the school collaborated with a local community organization on these strategies.

Limited English-proficient students/English learners

(b) 2016-2017 Strategies

- Met GNT/CI: no enhanced/additional strategies needed
 - ❖ All flyers are in Spanish and English that publicize the lottery, application process and information sessions. They are sent out in November and again in January.
 - ❖ Include a Spanish-speaking employee at each of the three enrollment sessions.
 - ❖ Share with Siglo 21 and Rumbo (local Spanish newspapers) recruitment information and other general information about the school two to three times prior to February Lottery.
 - ❖ Share flyers with Hispanic churches, specifically the Trinity Episcopal Church, and others that may be identified.
 - ❖ Have transitional services available for enrolment inquiries.
 - ❖ Continue to translate all materials into Spanish.
 - ❖ Hand delivered/send flyers to Destiny Spanish Market, High Street Market, YWCA, Jacqueline Grocery, Sam’s Food Store, Cibao Market and Latina Market, City Hall, the

(a) CHART data

School
percentage: 2.9%
GNT percentage: 3.5%
CI percentage: 5.4%

The school is below
GNT percentages and
below CI percentages

Haverhill Library, the three Market Basket locations, Head Start Program, Family and Community Connection, WICK/Community Action, Presidential Gardenes, Haverhill Housing Authority, Pentucket Medical Pediatrics, Children’s Health Care, Boys and Girls Club of Haverhill, Girls, Inc., Child Development Family Services, Merrimack Child Care, Noah’s Arc Day Care, The YMC, Hadley West, Goldman Family Center, Haverhill Day Care Center, International Day Care, Chan’s Taekwondo, Little Sprouts Day Care, Salvation Army, Emmaus House, Dr. Dental, Crowell’s School, Golden Hill School, GreenLeaf School, Bartlett School, Marigold Montessori, Walnut Square School, Moody School, Bradford Elementary School, Pentucket Lake School, Silver Hill School, Tilton School

(c) 2017-2018 Additional Strategy(ies), if needed

Did not meet GNT/CI: additional and/or enhanced strategies below: Include the time allotted for each strategy for data change (i.e. 2-3 years, 1 year) and/or if the school collaborated with a local community organization on these strategies.

Over the next three years, HVM will continue to utilize current strategies to influence all members of our community to enter the lottery with the goal of attaining a CI of 3.5 (2.9 currently) for this subgroup. Additional strategies for 17-18:

1. Create a postcard, in English and Spanish, to send bulk mail to residents of Haverhill. Have consultant edit for syntax.
2. Work with an ELL consultant (former ELL Director) to broaden out reach into the Hispanic/Latino community.

Students eligible for free or reduced lunch (Low Income/Economically Disadvantaged)

(b) 2016-2017 Strategies

- Met GNT/CI: no enhanced/additional strategies needed
- ❖ Target marketing materials to less affluent neighborhoods by posting flyers in public areas near them.
 - ❖ Provide flyers to community service agencies (Community Action, Education Services, Salvation Army, and Emmaus House)
 - ❖ Continue to supply information to low income housing projects to include Presidential Gardens and Bradford Arms.
 - ❖ Publicize that we offer a breakfast program.
 - ❖ Publicize that we have snacks available for any student.
 - ❖ Publicize school Before Care and YMCA After School program.
 - ❖ Work with HC Media to develop PSA that explains the above components.
 - ❖ Market to preschools and HeadStart programs.
 - ❖ Flyers handed out to over 40 local organizations

(c) 2017-2018 Additional Strategy(ies), if needed

Did not meet GNT/CI: additional and/or enhanced strategies below: Include the time allotted for each strategy for data change (i.e. 2-3 years, 1 year) and/or if the school collaborated with a local community organization on these strategies.

- ❖ established a relationship with Community Action of Haverhill facilitator of the

(a) CHART data

School percentage:
14.7%
GNT percentage: N/A
CI percentage: 36.6%

The school is below CI percentages

	HeadStart programs in the city. We will work with them on recruiting. Currently our Middle School students do community service with them.
<u>Students who are sub-proficient</u>	<p style="text-align: center;">(d) 2016-2017 Strategies</p> <ul style="list-style-type: none"> ❖ Flyers to local schools. ❖ Have regular representation at the Haverhill Parent District Council Meetings.
<u>Students at risk of dropping out of school</u>	<p style="text-align: center;">(e) 2016-2017 Strategies</p> <ul style="list-style-type: none"> ❖ Continue to provide Haverhill Public School guidance department with flyers announcing 's enrollment information and Lottery.
<u>Students who have dropped out of school</u>	<p style="text-align: center;">(f) 2016-2017 Strategies</p> <ul style="list-style-type: none"> ❖ Not Applicable
OPTIONAL <u>Other subgroups of students who should be targeted to eliminate the achievement gap</u>	<p style="text-align: center;">(g) 2016-2017 Strategies</p> <ul style="list-style-type: none"> ❖ Share enrollment information with related support groups at the local hospital Northeast ARC, Team Coordinating Agency, Northeast Behavioral Health, New England Rehab and outside therapists. ❖ HC Media PSA reoccurring on Haverhill public tv.

Retention Plan

2017-2018

Please provide a brief narrative report on the successes and challenges of implementing last year's retention strategies from the 2016-2017 Retention Plan.

2016-2017 Implementation Summary:

Hill View Montessori has enjoyed a positive retention program with attrition usually related to relocation of the families. This year we had three families move out of Haverhill. The Attendance Rate was 96.3%, similar to the past four years (96.7, 96.3, 96.1, and 96.3). Students bounce out of their cars and off the buses every day with smiles and eagerness to get to their classrooms. Parents send their children to HVM for a Montessori education and from the Parent Survey 2017, 82% of those that responded stated, "The school's mission is clearly focused on desired student learning". Additionally, 87.5% agreed with the statement, "My child is provided with opportunities to develop critical thinking skills"; and 84%, "My child is provided with opportunities to develop creative problem solving skills".

We will continue to use the 2016-17 strategies, with a few updates:

- ❖ The Special Education Director continued the Special Education Service program (one Teacher per level); and held weekly staff meetings to address the needs of this population.
- ❖ We are aggressively looking for an ELL teacher.
- ❖ A Kindergarten Lead Teacher attends the informational meetings for prospective parents.
- ❖ The principal and all but three faculty members took appropriate SEI training offered by the state.
- ❖ Our school social worker worked with families to provide additional services through local agencies as needed for a variety of circumstances, (lack of food, emotional issues, social issues, and transitional issues.)
- ❖ We continue to assess and refine the Montessori program to meet the student where he/she academically resides.
- ❖ A .5FTE Guidance Counselor is on staff to work with teachers and students on classroom management strategies (utilizing Grace and Courtesy)
- ❖ We continue to offer a summer session for 1-6 students and incoming Kindergarten students to supplement their education opportunities.
- ❖ A Montessori Coach/Mentor will observe and demonstrate Montessori best practices; will shared information with teachers during weekly Collaboration Meetings; and monitor student progress.
- ❖ Professional Development addresses the Montessori lessons enhancing the continuity of instruction across the four levels, (K, Lower Elementary, Upper Elementary and Middle School). A special focus was on Social Emotional PD (Grace and Courtesy curriculum) as we partnered with MHVMA's Model Schools Demonstration Project for a second year. Middle School is preparing an Advisory/Community Meeting curriculum for the 2017-18 school year.
- ❖ The school's annual Talent Show included multi-cultural acts, some with parent/child performances.
- ❖ HVM continued the Before and After School programs, provided breakfast and snacks for any student.
- ❖ Fitness instructor and Social Worker implemented two student leadership groups within Upper Elementary.
- ❖ Early morning fitness groups for Lower Elementary were implemented to help them settle in to their work period with clear minds and relaxed bodies.
- ❖ The MARC group will provide two assemblies (age appropriate) on bullying intervention and prevention strategies.

Overall Student Retention Goal	
Annual goal for student retention (percentage):	97%

Retention Plan –Strategies
List strategies for retention activities for each demographic group.

Special education students/students with disabilities

<p><u>(a) CHART data</u></p> <p>School percentage:14.7% Third Quartile: 21.1%</p> <p>The school is <u>below</u> third quartile percentages.</p>	<p align="center">(b) 2016-2017 Strategies</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Below third quartile: no enhanced/additional strategies needed <ul style="list-style-type: none"> ❖ Continue to strengthen the Special Education program through on-going professional development in both Montessori strategies and best practice for student - identified needs. ❖ Participate in MHVMA Model School Demonstration Project. ❖ Collect exit data from departing families. ❖ Collect data from parent survey and share with SpEd Department. ❖ Communicate parent meetings through personal invitations. ❖ Integrate software use into programs on newly purchased iPads. ❖ Provide tutoring for state testing.
	<p align="center">(c) 2017-2018 Additional Strategy(ies), if needed</p> <ul style="list-style-type: none"> <input type="checkbox"/> Above third quartile: additional and/or enhanced strategies described below: Include the time allotted for each strategy for data change (i.e. 2-3 years, 1 year) and/or if the school collaborated with a local community organization on these strategies.

Limited English-proficient students/English learners

Limited English-proficient students

<p><u>(a) CHART data</u></p> <p>School percentage: 0% Third Quartile: 21.1%</p> <p>The school is <u>below</u> third quartile percentages.</p>	<p align="center">(b) 2016-2017 Strategies</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Below third quartile: no enhanced/additional strategies needed <ul style="list-style-type: none"> ❖ Provide students with ELL certified teachers. (14 teachers have completed the RETELL Sheltered English Immersion course) ❖ Provide interpreters at Parent-Teacher conferences. ❖ Translate parent information documents. ❖ Host one multi-cultural event each year. ❖ Offer summer session where applicable.
	<p align="center">(c) 2017-2018 Additional Strategy(ies), if needed</p> <ul style="list-style-type: none"> <input type="checkbox"/> Above third quartile: additional and/or enhanced strategies described below. Include the time allotted for each strategy for data change (i.e. 2-3 years, 1 year) and/or if the school collaborated with a local community organization on these strategies. <input checked="" type="checkbox"/> No ELs were enrolled during the 2016-2017 school year. No retention strategies needed.

Students eligible for free or reduced lunch (low income/economically disadvantaged)

<p>(a) CHART data</p> <p>School percentage: 0% Third Quartile: 21.4%</p> <p>The school is <u>below</u> third quartile percentages.</p>	<p align="center">(b) 2016-2017 Strategies</p> <p><input checked="" type="checkbox"/> Below median and third quartile: no enhanced/additional strategies needed</p> <ul style="list-style-type: none"> ❖ Support families with identified needs utilizing our Social worker and Community Services. ❖ Negotiate with Food Service company to offer appealing lunches and breakfast. Unused fruit and snacks are available to any student during the day. ❖ Continue to provide breakfast program. <hr/> <p align="center">(c) 2017-2018 Additional Strategy(ies), if needed</p> <p><input type="checkbox"/> Above third quartile: additional and/or enhanced strategies described below. Include the time allotted for each strategy for data change (i.e. 2-3 years, 1 year) and/or if the school collaborated with a local community organization on these strategies.</p>
<p><u>Students who are sub-proficient</u></p>	<p align="center">(d) 2016-2017 Strategies</p> <ul style="list-style-type: none"> ❖ Provide a summer session for children in need of sustaining activities. ❖ Provide MCAS tutoring in math and reading. ❖ Continually monitor reading and math instruction data. ❖ Reassess Title 1 services throughout the year.
<p><u>Students at risk of dropping out of school</u></p>	<p align="center">(e) 2016-2017 Strategies</p> <ul style="list-style-type: none"> ❖ Provide support from Social Worker and outside counselors to student and parents. ❖ We do not have drop outs.
<p><u>Students who have dropped out of school</u></p>	<p align="center">(f) 2016-2017 Strategies</p> <ul style="list-style-type: none"> ❖ Not Applicable
<p>OPTIONAL</p> <p><u>Other subgroups of students who should be targeted to eliminate the achievement gap</u></p>	<p align="center">(g) 2016-2017 Strategies</p> <ul style="list-style-type: none"> ❖ Not Applicable

APPENDIX C - SCHOOL AND STUDENT DATA

Hill View Montessori Charter Public School district profile link:

<http://profiles.doe.mass.edu/profiles/student.aspx?orgcode=04550050&orgtypecode=6&>

STUDENT DEMOGRAPHIC AND SUBGROUP INFORMATION		
Race/Ethnicity	# of students	% of entire student body
African-American	16	5.2%
Asian	3	0.7%
Hispanic	56	18.3%
Native American	1	0.3%
White	222	72.5%
Native Hawaiian, Pacific Islander	0	0.0%
Multi-race, non-Hispanic	9	2.9%
Special education	42	13.7%
Limited English proficient	13	4.2%
Low income	45	14.7%

ADMINISTRATIVE ROSTER FOR THE 2016-2017 SCHOOL YEAR			
Name, Title	Brief Job Description	Start date	End date (if no longer employed at the school)
Jeanne Schultz	Executive Director	8/2013	
Debra Diggins	Educational Program Director	8/2012	
Michael Petersen	Technology & Data Manager	2/2012	
Richard Weeks	Business & Facilities Manager	7/2014	

TEACHERS AND STAFF ATTRITION FOR THE 2016-2017 SCHOOL YEAR				
	Number as of the last day of the 2016-2017 school year	Departures during the 2015-2016 school year	Departures at the end of the school year	Reason(s) for Departure
Teachers	26	1	4	Job Opportunity, Retirement
Other Staff	25	3	2	Job Opportunity

BOARD MEMBERS FOR THE 2016-17 SCHOOL YEAR

Name	Position on the Board	Committee affiliation(s)	Number of terms served	Length of each term (including date of election and expiration)
Stewart Lytle	Chair	Trustees Committee	1	Elected July 2015; Term ends June 2018
Stephanie Tanguay	Trustee	Development Committee	1	Elected June 2015; Term ends June 2018
Lisa Phillips	Clerk		1	Elected March 2014; Term ends June 2017
Amanda Durand	Trustee		1	Elected January 2017; Resigned June 2017
Geraldine Smith	Trustee		1	Elected July 2015; Term ends June 2018
Matthew Moscardini	Trustee	Accountability Committee	1	Elected September 2013; Term ends June 2019
Nicholas Hirth	Trustee	Finance Committee	1	Elected June 2014; Term ends June 2020
Veronica George-Freiberger	Trustee		1	Elected June 2015; Term ends June 2018
James Paikos	Trustee		1	Elected June 2016; Term ends June 2019
Jeanne Schultz	Ex-Officio	All	1	Serving since August 2013

APPENDIX D - ADDITIONAL REQUIRED INFORMATION

Key Leadership Changes

Position	Name	No Change/New/Open Position
Board of Trustees Chairperson	Stewart Lytle	New Chairperson
Charter School Leader	Jeanne Schultz	No Change
Assistant Charter School Leader	N/A	N/A
Special Education Director	Susan Fitchett	New Director
MCAS Test Coordinator	Debra Diggins	No Change
SIMS Coordinator	Michael Petersen	No Change
English Language Learner Director	Debra Diggins	No Change
School Business Official	Richard Weeks	No Change
SIMS Contact	Michael Petersen	No Change

Facilities

Location	Dates of Occupancy
75 Foundation Avenue Haverhill, Massachusetts	2010 - Present

Enrollment

Action	Date(s)
Student Application Deadline	January 12, 2017
Lottery	January 19, 2017

ATTACHMENTS

Attachment Item 1 – Unaudited DRAFT Income Statement for FY17

	Jul '16 - Ju...
Ordinary Income/Expense	
Income	
4000 · State Sources	
4010 · Tuition	3,153,555.00
4020 · State Grants	
4031 · STARS Res Mass Cultrl Grant-net	0.00
4020 · State Grants - Other	15.00
Total 4020 · State Grants	15.00
Total 4000 · State Sources	3,153,570.00
4200 · Federal Sources	
4021 · EEC 262	1,134.00
4022 · SPED Idea 240	67,802.00
4023 · TITLE I	
4024 · TITLE I 305	51,958.00
4025 · TITLE IIA 140	3,110.00
Total 4023 · TITLE I	55,068.00
4029 · SPED 274	3,500.00
4030 · Medicaid	9,312.22
Total 4200 · Federal Sources	136,816.22
4300 · Private Grants	
4300.2 · Demoulas Grant	10,000.00
4300.3 · Target Field Trip Grants	0.00
4300 · Private Grants - Other	19.20
Total 4300 · Private Grants	10,019.20
4700 · Student Services Income	
4701 · School Lunch - Fed & State	
4701 Fe · Student Lunch- Federal	21,499.12
4701 MA · Student Lunch- State	486.78
Total 4701 · School Lunch - Fed & State	21,985.90
4702 · Student Lunch Payments	13,351.20
4703 · After Care Income	7,240.00
4704 · Before Care Income	14,150.50
Total 4700 · Student Services Income	56,727.60
4800 · Other Sources	
4803 · Miscellaneous Income	80.00
4804 · Fundraiser Income	
4804.2 · Beautification Fundraiser (net)	1,070.08
4804.3 · Margarita's Fundraiser (net)	850.61
4804.4 · Raffles (net)	1,815.00
4804 · Fundraiser Income - Other	1,540.13
Total 4804 · Fundraiser Income	5,275.82
Total 4800 · Other Sources	5,355.82
4900 · Gifts In Kind	
4900.1 · MTRS In-Kind	460,688.00
Total 4900 · Gifts In Kind	460,688.00
Total Income	3,823,176.84
Gross Profit	3,823,176.84
Expense	
5050 · Payroll Taxes	
5051 · Medicare	-4,153.40
5052 · OASDI	-5,435.98
5053 · MA Unemployment	-4,852.09

	Jul '16 - Ju...
5055 · MA-ER Medical Contribution	-161.84
Total 5050 · Payroll Taxes	-14,603.31
5100 · Employee Benefits	
5101 · Health insurance (net)	111,424.72
5102 · Dental insurance (net)	9,792.72
5104 · Employee Insurance (net)	0.36
5105 · Med FSA (net)	2,081.24
5100 · Employee Benefits - Other	461,756.00
Total 5100 · Employee Benefits	585,055.04
5150 · Advertising/Recruitment - #183	1,237.62
5200 · Board of Trustees/Governance	
5200.1 · Board Travel & Other Exp - #112	991.76
5200 · Board of Trustees/Governance - Other	628.18
Total 5200 · Board of Trustees/Governance	1,619.94
5250 · School Outside Consult Services	
5252 · Consult-Instructional	450.00
5254 · Consult-Specialist	60.00
5256 · Consult-Lunch Services - #335	4,304.00
5257 · Consult-OT - #234	17,566.89
5258 · Consult-PT - #234	7,509.38
5262 · Consult-Medicaid	200.04
Total 5250 · School Outside Consult Services	30,090.31
5300 · Equipment & Furniture	
5302 · E&F Administrative	149.98
5303 · Copier Lease	9,283.40
5305 · Classroom Furniture	5,474.76
Total 5300 · Equipment & Furniture	14,908.14
5350 · Facilities	
5353 · Repairs & maintenance - #430	89,430.13
5354 · Utilities - #420	
5354.1 · Electricity	67,496.02
5354.2 · Gas	4,278.79
5354.3 · Water	1,671.20
5354 · Utilities - #420 - Other	85.00
Total 5354 · Utilities - #420	73,531.01
5355 · Building supplies - #410	12,388.54
5356 · Outside Cleaning Services- #410	111,658.75
5358 · Capital Lease-Bld Rent Interest	
5358.1 · Birch Room Rent	15,000.00
5358 · Capital Lease-Bld Rent Interest - Other	107,858.00
Total 5358 · Capital Lease-Bld Rent Interest	122,858.00
5359 · Permits/Fees	
5359.1 · Inspections - #410	1,112.00
5359 · Permits/Fees - Other	1,260.00
Total 5359 · Permits/Fees	2,372.00
5360 · Security Services	1,346.65
Total 5350 · Facilities	413,585.08
5400 · Fees/Memberships/Dues	
5400.1 · Grants	450.00
5400.2 · Recruiting/Advertising	1,047.38

	Jul '16 - Ju...
5400 · Fees/Memberships/Dues - Other	13,661.31
Total 5400 · Fees/Memberships/Dues	15,158.69
5450 · Insurance	
5452 · Insurance Expense	620.00
5453 · Workers Comp. Insurance	16,691.00
5454 · Liability Insurance	10,123.00
Total 5450 · Insurance	27,434.00
5500 · Marketing/Public Relations	580.93
5550 · Materials & Supplies	
5551 · M&S Administrative	2,431.27
5552 · M&S Instr - Testing & Gen'l	
5552.1 · Assessment Contractual	3,520.00
5552 · M&S Instr - Testing & Gen'l - Other	1,740.97
Total 5552 · M&S Instr - Testing & Gen'l	5,260.97
5553 · M&S Instruc classroom-Teachers	7,891.06
5554 · M&S Educational Materials	
5554.01 · ED Materials	248.44
5554.02 · EPD Materials	159.04
5554.03 · Curriculum	2,517.35
5554.04 · Montessori Materials	11,901.94
5554.05 · Mentors Materials	34.19
5554.06 · Project Groups	1,670.50
5554.10 · Grants	52.69
Total 5554 · M&S Educational Materials	16,584.15
5555 · M&S SPED	
5555.1 · Grants	2,167.68
5555 · M&S SPED - Other	439.41
Total 5555 · M&S SPED	2,607.09
5556 · M&S Specialists	2,940.50
5557 · M&S Non Instructional	1,599.09
Total 5550 · Materials & Supplies	39,314.13
5600 · Office Expenses - #185	10,521.48
5650 · Prof. Development Salaries-#241	
5650.1 · Grants	1,000.00
5651 · PD Administrative	454.00
5653 · PD SPED	1,154.66
5654 · PD Specialist	250.00
5655 · PD Non Instructional	1,695.00
5656 · PD Instructional	5,742.72
5657 · PD Montessori Training	2,463.00
5658 · PD Instructional Assistant	425.00
5659 · PD Admin Support	220.00
5660 · PD Pupil Services	549.17
5650 · Prof. Development Salaries-#241 - Other	83.00
Total 5650 · Prof. Development Salaries-#241	14,036.55
5700 · Business Outside Consult Servic	
5702 · Audit	
5702.1 · Financial Audit	16,195.50
5702.2 · Montessori Audit	5,500.00
Total 5702 · Audit	21,695.50
5703 · Legal Fees - #152	3,916.37
5704 · Payroll Service Fees - #142	
5704.1 · Payroll Processing Fees	4,612.32
5704.2 · Human Resources	9,441.63

	Jul '16 - Ju...
5704.3 · Flexible Spending Account	1,475.00
Total 5704 · Payroll Service Fees - #142	15,528.95
5706 · 403B Administrative Fee	550.00
Total 5700 · Business Outside Consult Servic	41,690.82
5750 · Student Services Expenses	
5751 · Lunch & Breakfast Expense	40,696.95
5753 · Extra Curricular Expenses (net)	
5753.2 · Student Council (net)	-103.42
5753.1 · AfterSchool Art Club (net)	-1,791.12
5753 · Extra Curricular Expenses (net) - Other	-2,551.10
Total 5753 · Extra Curricular Expenses (net)	-4,445.64
5754 · Field Trips- School Events(net)	-2,249.08
5756 · Fundraiser Event (net)	-2,283.07
Total 5750 · Student Services Expenses	31,719.16
5800 · Technology & Telecommunications	
5801 · Computer Internet/Phone #440	1,395.79
5803 · Computer Maint & Sup #163	4,860.41
5804 · Computer Software Admin #163	
5804.1 · Grants- SPED Software Admin	1,166.00
5804 · Computer Software Admin #163 - Other	9,722.69
Total 5804 · Computer Software Admin #163	10,888.69
5805 · Computer Software Instruc #268	2,188.95
5807 · Computer Hardware Expenses	
5807.1 · Instructional Hardware - #266	13,970.60
5807.2 · Non-Instructional Hardware #163	7,052.48
Total 5807 · Computer Hardware Expenses	21,023.08
Total 5800 · Technology & Telecommunications	40,356.92
5850 · Miscellaneous/Travel/Meals	
5850.2 · PD Travel & other Expenses #244	596.36
5850 · Miscellaneous/Travel/Meals - Other	1,722.56
Total 5850 · Miscellaneous/Travel/Meals	2,318.92
6000 · Salaries & Wages	
6011.0 · Stipends	
6011.3 · Before Care Stipend Exp - #232	7,485.00
6011.4 · Mentor Stipends - #241	3,250.00
6011.6 · Team Leader Stipends	7,112.50
6161.1 · Data Team Stipends	1,687.50
6370.1 · Extra Curricular Activities	
6370.11 · Athletic Services - #325	1,250.00
6370.12 · After School Art Club - #360	1,500.00
Total 6370.1 · Extra Curricular Activities	2,750.00
Total 6011.0 · Stipends	22,285.00
6121.3 · Admin - School Leaders	128,400.67
6131.3 · Admin - Business & Finance	119,929.89
6161.3 · Admin - Info Manag & Tech	61,236.07
6171.3 · Admin - Development	2,719.75
6181.3 · Admin - Other Admin	77,223.63
6211.1 · Inst Leadership	81,981.92
6211.2 · Inst Leadership - SPED	24,392.25
6221.1 · Inst - Teachers - GE	
6221.10 · X-Substitute-Teacher-GE #231.1	0.00
6221.1 · Inst - Teachers - GE - Other	696,421.88

	Jul '16 - Ju...
Total 6221.1 · Inst - Teachers - GE	696,421.88
6221.2 · Inst - Teachers - SPED	-10,889.67
6222.1 · Inst - Teach - Spec - GE	
6222.5 · Inst - Teach - Spec -Grant	98,178.11
6222.1 · Inst - Teach - Spec - GE - Other	66,326.95
Total 6222.1 · Inst - Teach - Spec - GE	164,505.06
6222.2 · Inst - Teach - Spec-SPED	75,486.45
6231 · Substitutes	
6231.1 · Substitutes-General Education	21,341.58
6231.2 · Substitutes - SPED	6,970.00
Total 6231 · Substitutes	28,311.58
6232.1 · Inst - Asst - GE	
6232.10 · X-Substitutes-Inst-Asst-GE231.1	0.00
6232.1 · Inst - Asst - GE - Other	251,399.07
Total 6232.1 · Inst - Asst - GE	251,399.07
6232.2 · Inst - Asst - SPED	4,763.83
6232.5 · Inst - Asst - Grants	-280.87
6251.1 · Inst - Guidance, Psych, Testing	39,371.90
6251.2 · Inst-Guidance, Psych, Test-SPED	18,500.00
6310.3 · Pupil Services	
6310.10 · X-Substitute- PupilService231.1	0.00
6310.3 · Pupil Services - Other	49,999.07
Total 6310.3 · Pupil Services	49,999.07
6400.5 · Summer School Grants	5,173.33
6000 · Salaries & Wages - Other	255,342.00
Total 6000 · Salaries & Wages	2,096,272.81
6900 · Payroll Tax	
6901 · Medicare	28,592.33
6902 · OASDI	34,732.26
6903 · MA Unemployment	27,040.18
6904 · MA-ER Medical Contribution	3,000.39
6900 · Payroll Tax - Other	-652.48
Total 6900 · Payroll Tax	92,712.68
Total Expense	3,444,009.91
Net Ordinary Income	379,166.93
Other Income/Expense	
Other Income	
8400 · Project Income	
8400.16 · Birch Room Income	950.00
Total 8400 · Project Income	950.00
7010 · Interest Income	740.98
Total Other Income	1,690.98
Other Expense	
8500 · Project Expenses	
8500.16 · Birch Room Expenses	2,290.00
Total 8500 · Project Expenses	2,290.00
8000 · Depreciation	
8001 · Depreciation - Buildings	130,524.00
8002 · Depreciation - Capital Equip.	21,670.34
8000 · Depreciation - Other	3,007.32
Total 8000 · Depreciation	155,201.66
Total Other Expense	157,491.66
Net Other Income	-155,800.68
Net Income	<u>223,366.25</u>

Attachment Item 2 – Unaudited DRAFT Balance Sheet for FY17

	Jun 30, 17
ASSETS	
Current Assets	
Checking/Savings	
1010 · Pentucket Checking Acct 3361	155,856.00
1020 · Pentucket Savings Acct 3536	1,273,249.97
1022 · Pentucket Capital Reserve 2015	26,660.03
1031 · Playground Reserve Fund 9259	41,223.26
1035 · Pentucket - Beautification 8804	2,531.88
1040 · Petty Cash	400.00
Total Checking/Savings	1,499,921.14
Accounts Receivable	
1200 · Accounts Receivable	22,405.29
Total Accounts Receivable	22,405.29
Other Current Assets	
1350 · Prepaid Expenses	
1351 · Prepaid Insurance	6,563.84
Total 1350 · Prepaid Expenses	6,563.84
1500 · Undeposited Funds	560.00
Total Other Current Assets	7,123.84
Total Current Assets	1,529,450.27
Fixed Assets	
1610 · Leasehold Improvements-Net	
1611 · Leasehold Improvements-Cost	51,542.00
1615 · Accum. Depr.-Leasehold Improve	-12,890.66
Total 1610 · Leasehold Improvements-Net	38,651.34
1620 · Computer Equipment-Net	
1621 · Computer Equipment-Cost	85,300.00
1625 · Accum. Depr.-Computer Equip	-85,300.00
Total 1620 · Computer Equipment-Net	0.00
1630 · Equipment-Net	
1630.0 · Equipment-Mechanical	15,206.65
1631 · Equipment-Instructional	25,957.75
1632 · Equipment-Administrative	19,180.00
1633 · Mechanical Equipment	-4,561.92
1635 · Accum. Depr.-Equipment	-45,137.75
Total 1630 · Equipment-Net	10,644.73
1640 · Classroom Furniture-Net	
1641 · Classroom Furniture-Cost	97,783.00
1645 · Accum. Depr.-ClassroomFurniture	-85,515.12
Total 1640 · Classroom Furniture-Net	12,267.88
1650 · Office Furniture-Net	
1651 · Office Furniture-Cost	23,560.00
1652 · Accum. Depr.-Office Furniture	-19,265.00
Total 1650 · Office Furniture-Net	4,295.00
1660 · Building- 75 Foundation Ave.	
1661 · Building-75 Foundation Ave.Cost	78,831.00
1662 · Accum.Depr.- Building	-21,501.00
Total 1660 · Building- 75 Foundation Ave.	57,330.00
1670 · CapLease Building&Improvements	
1671 · Capital Lease-Building	3,786,775.00
1672 · Capital Lease-Improvements	50,045.00
1673 · Accum Depr-Cap Lease Building	-930,227.00

	Jun 30, 17
1674 · AccumDepre-CapLeaseImprovements	-10,008.00
Total 1670 · CapLease Building&Improvements	2,896,585.00
1680 · Playground-Net	
1681 · Playground - Cost	144,861.39
1682 · Accum.Depr.- Playground	-27,505.28
Total 1680 · Playground-Net	117,356.11
Total Fixed Assets	3,137,130.06
TOTAL ASSETS	<u>4,666,580.33</u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2000 · Accounts Payable	8,093.43
Total Accounts Payable	8,093.43
Credit Cards	
1050 · Visa Credit Card - 0882 - 4110	7,842.60
Total Credit Cards	7,842.60
Other Current Liabilities	
2100 · Payroll Liabilities	
2101 · W/H EE Fed/State,OASDI,Medicare	1,501.09
2106 · 403 (b) payable	-1,835.54
2107 · Mass Teachers Retirement Fund	11,215.87
Total 2100 · Payroll Liabilities	10,881.42
2300 · Accrued Expenses	
2301 · Accrued Salaries and Wages	253,264.04
2303 · Accrued Payroll Taxes	10,902.80
2305 · Accrued expense	240.00
2306 · Accrued Prior Year Vacation	12,438.94
Total 2300 · Accrued Expenses	276,845.78
Total Other Current Liabilities	287,727.20
Total Current Liabilities	303,663.23
Long Term Liabilities	
2021 · Capital Lease Payable-Principal	3,184,722.00
Total Long Term Liabilities	3,184,722.00
Total Liabilities	3,488,385.23
Equity	
3300 · Retained Earnings	985,101.33
Net Income	193,093.77
Total Equity	1,178,195.10
TOTAL LIABILITIES & EQUITY	<u>4,666,580.33</u>

Attachment Item 3 –School Budget for FY18 (Approved by BOT on 6/15/17)

FY18 Budget, 6/15/17

	FY18 Budget - Draft	FY18 Grants Budget Draft
Ordinary Income/Expense		
Income		
4000 · State Sources		
4010 · Tuition	3,205,810.00	
4020 · State Grants		
4021 · EEC 262		1,325.00
4031 - STARS Res Mass Cultural Grant		
Total 4020 · State Grants	-	1,325.00
Total 4000 · State Sources	3,205,810.00	1,325.00
4200 · Federal Sources		
4022 · SPED Idea 240		68,480.00
4023 · TITLE I		
4024 · TITLE I 305		32,025.00
4025 · TITLE IIA 140		3,141.00
Total 4023 · TITLE I	-	35,166.00
4029 · SPED 274		3,535.00
4030 - Medicaid		2,320.75
Total 4200 · Federal Sources	-	109,501.75
4300 · Private Grants		
4300.1 · Capital Grant Income		
4300.2 · Demoulas Grant		
4300 · Private Grants - Other		
Total 4300 · Private Grants		
4700 · Student Services Income		
4701 · School Lunch - Fed & State		
4701 Fe · Student Lunch- Federal	19,445.00	
4701 MA · Student Lunch- State	631.00	-
Total 4701 · School Lunch - Fed & State	20,076.00	
4702 · Student Lunch Payments	10,935.00	
4703 · After Care	4,646.00	
4704 · Before Care	10,585.00	
Total 4700 · Student Services Income	46,242.00	
4800 · Other Sources		
4804 · Fundraiser Income		
4804.2 · Beautification Fundraiser (net)		
4804.3 · Margarita's Fundraiser (net)		
Total 4804 · Fundraiser Income		
4805 · Budget Transfer Income		
4805.1 · Budget Transfer Income 12-9-16	-	-
4805 · Budget Transfer Income - Other	-	-
Total 4805 · Budget Transfer Income	-	-
Total 4800 · Other Sources	-	-
Total Income	3,252,052.00	110,826.75
Gross Profit	3,252,052.00	110,826.75
Expense		
5100 · Employee Benefits		

	FY18 Budget - Draft	FY18 Grants Budget Draft
5101 · Health insurance - net	147,458.08	
5102 · Dental insurance - net	11,698.38	
5104 · Employee Insurance - net		
5105 · Med FSA - net		
5100 · Employee Benefits - Other	1,068.00	
Total 5100 · Employee Benefits	160,224.46	-
5150 · Advertising/Recruitment	1,950.00	
5200 · Board of Trustees/Governance	2,000.00	
5200.1 · Board Travel & Other Exp - #112		
5200 · Board of Trustees/Governance - Other		
Total 5200 · Board of Trustees/Governance		
5250 · School Outside Consult Services		
5251 · Consult-Administrative	2,550.00	
5252 · Consult-Instructional/Montessori	9,500.00	
5252.1 · Grants		
5252 · Consult-Instructional - Other		
Total 5252 · Consult-Instructional	9,500.00	-
5253 · Consult-SPED		
5253.1 · SPED Reserve	10,000.00	
5255 · Consult-Non Instructional	1,500.00	
5256 · Consult-Lunch Services - #335	5,100.00	
5257 · Consult-OT - #234		
5257.1 · Grants		
5257 · Consult-OT - Other	18,000.00	
Total 5257 · Consult-OT	18,000.00	-
5258 · Consult-PT - #234		
5258.1 · Grants		
5258 · Consult-PT - Other	6,120.00	
Total 5258 · Consult-PT	6,120.00	-
5262 · Consult-Medicaid	-	
Total 5250 · School Outside Consult Services	52,770.00	-
5300 · Equipment & Furniture		
5303 · Copier Lease	12,135.00	
5305 · Classroom Furniture	-	
Total 5300 · Equipment & Furniture	12,135.00	-
5350 · Facilities		
5353 · Repairs & maintenance - #430	112,292.00	
5354 · Utilities - #420		
5354.1 · Electricity	70,126.81	
5354.2 · Gas	6,078.28	
5354.3 · Water	3,687.59	
Total 5354 · Utilities - #420		
5355 · Building supplies - #410	15,300.00	
5356 · Outside Cleaning Services- #410	110,000.00	
5358 · Capital Lease-Bld Rent Interest	104,807.00	

	FY18 Budget - Draft	FY18 Grants Budget Draft
5358.1 · Birch Room Rent	18,000.00	
Total 5358 · Capital Lease-Bld Rent Interest		
5359 · Permits/Fees	4,000.00	
5359.1 · Inspections - #410		
5359 · Permits/Fees - Other		
Total 5359 · Permits/Fees		
5360 · Security Services	4,000.00	
Total 5350 · Facilities	448,291.68	-
5400 · Fees/Memberships/Dues	15,300.00	
5400.1 · Grants		
5400.2 · Recruiting/Advertising		
5400 · Fees/Memberships/Dues - Other		
Total 5400 · Fees/Memberships/Dues		
5450 · Insurance		
5452 · Insurance Expense	1,302.00	
5453 · Workers Comp. Insurance	17,525.55	
5454 · Liability Insurance	19,611.90	
Total 5450 · Insurance	38,439.45	
5500 · Marketing/Public Relations	3,000.00	
5550 · Materials & Supplies		
5551 · M&S Administrative	5,000.00	
5552 · M&S Instr - Testing & Gen'l		
5552.1 · Assessment Contractual	4,485.60	
5552 · M&S Instr - Testing & Gen'l - Other	1,020.00	
Total 5552 · M&S Instr - Testing & Gen'l	5,505.60	
5553 · M&S Instruc classroom-Teachers	8,000.00	
5554 · M&S Educational Materials		
5554.01 · ED Materials	1,500.00	
5554.02 · EPD Materials	1,500.00	
5554.03 · Curriculum	2,550.00	
5554.04 · Montessori Materials	6,120.00	
5554.05 · Mentors Materials	459.00	
5554.06 · Project Groups	2,040.00	
5554.10 · Grants		250.00
5554 · M&S Educational Materials - Other	1,000.00	
Total 5554 · M&S Educational Materials	15,169.00	250.00
5555 · M&S SPED	510.00	
5555.1 · Grants		5,363.82
5555 · M&S SPED - Other		
Total 5555 · M&S SPED		
5556 · M&S Specialists	4,800.00	
5557 · M&S Non Instructional	2,575.00	
Total 5550 · Materials & Supplies	41,559.60	5,363.82
5600 · Office Expenses	10,500.00	
5650 · Prof. Development Salaries-#241		

	FY18 Budget - Draft	FY18 Grants Budget Draft
5650.1 - Grants		
5651 - PD Administrative	3,650.00	
5652 - PD Consultant Trainers	3,570.00	
5653 - PD SPED	1,050.00	
5654 - PD Specialist	600.00	
5655 - PD Non Instructional	1,800.00	
5656 - PD Instructional		
5656.1 - Grants		2,852.00
5656 - PD Instructional - Other	7,570.00	
Total 5656 - PD Instructional	7,570.00	2,852.00
5657 - PD Montessori Training	16,830.00	
5658 - PD Instructional Assistant	1,300.00	
5659 - PD Admin Support	-	
5660 - PD Pupil Services		
5650 - Prof. Development Salaries-#241 - Other		
Total 5650 - Prof. Development Salaries-#241	36,370.00	2,852.00
5700 - Business Outside Consult Serv		
5702 - Audit		
5702.1 - Financial Audit	16,500.00	
5702.2 - Montessori Audit	3,500.00	
Total 5702 - Audit	20,000.00	-
5703 - Legal Fees - #152	5,000.00	
5704 - Payroll Service Fees - #142		
5704.1 - Payroll Processing Fees	5,000.00	
5704.2 - Human Resources	10,299.96	
5704.3 - Flexible Spending Account	1,375.00	
Total 5704 - Payroll Service Fees	16,674.96	-
5706 - 403B Administrative Fee	400.00	
Total 5700 - Business Outside Consult Serv	42,074.96	-
5750 - Student Services Expenses		
5751 - Lunch & Breakfast Expense	40,800.00	
5753 - Extra Curricular Expenses (net)		
5754 - Field Trips- School Events(net)	5,775.00	
5756 - Fundraiser Event (net)		
5757 - Student Transportation		
5757.1 - Grants		1,173.00
5757.2 - Kindergarten Transportation	370.00	

	FY18 Budget - Draft	FY18 Grants Budget Draft
Total 5757 · Student Transportation	370.00	1,173.00
Total 5750 · Student Services Expenses	46,945.00	1,173.00
5800 · Technology & Telecommunications		
5801 · Computer Internet/Phone #440	1,680.00	
5803 · Computer Maint & Sup #163	5,500.00	
5804 · Computer Software Admin #163	6,933.00	
5804.1 - SPED Software Admin		1,200.00
5804.2 - SPED Software Student		200.00
Total 5804 · Computer Software Admin #163		
5805 · Computer Software Instruc #268	1,767.00	
5807 · Computer Hardware Expenses		
5807.1 · Instructional Hardware - #266	22,900.00	
5807.2 · Non-Instructional Hardware #163	3,500.00	
5807.1 - SPED		
Total 5807 · Computer Hardware Expenses		
Total 5800 · Technology & Telecommunications	42,280.00	1,400.00
5850 · Miscellaneous/Travel/Meals	2,040.00	
5850.2 · PD Travel & other Expenses #244		
5850 · Miscellaneous/Travel/Meals - Other		
Total 5850 · Miscellaneous/Travel/Meals		
6000 · Salaries & Wages		
5011.0 · Stipends - Pupil Services		
6011.30 · Before Care Stipends	7,500.00	
6011.4 · Mentor Stipends - #241	2,000.00	
xxxx · Mentor Stipend Grant		1,000.00
6011.6 · Team Leader Stipend	7,500.00	
6161.1 · Data Team Stipends	1,000.00	
6370.1 · Extra Curricular Activities	2,000.00	
6370.12 · Other Student Activites - #360		
6370.11 · Athletic Services - #325		
6370.12 · After School Club - Art		
6370.1 · Extra Curricular Activities - Other		
Total 6370.1 · Extra Curricular Activities		
Total 5011.0 · Stipends - Pupil Services	20,000.00	1,000.00
6121.3 · Admin - School Leaders	128,646.09	
6131.3 · Admin - Business & Finance	127,899.35	
6161.3 · Admin - Info Manag & Tech	62,841.79	
6171.3 · Admin - Development	19,500.00	
6181.3 · Admin - Other Admin	80,859.40	
6211.1 · Inst Leadership	84,543.37	
6211.2 · Inst Leadership - SPED	48,409.41	
6221.1 · Inst - Teachers - GE		
6221.10 · Substitutes - Teachers - GE	34,300.00	
6221.5 · Inst - Teachers - GE - Grants		
6221.1 · Inst - Teachers - GE - Other	836,354.20	
Total 6221.1 · Inst - Teachers - GE	870,654.20	-
6222.2 · Inst - Teachers - SPED	130,568.65	

	FY18 Budget - Draft	FY18 Grants Budget Draft
6222.20 · Substitutes - Teachers - SPED		
6222.1 · Inst - Teach - Specialists - GE		
6222.15 · Inst - Teach - Spec - GE -Grant		26,141.30
6222.1 · Inst - Teach - Specialists - GE - Other	88,756.03	
Total 6222.1 · Inst - Teach - Specialists - GE	88,756.03	26,141.30
6222.2 · Inst - Teach - Specialists-SPED		
6222.5 · Inst - Teach - Spec -SPED-Grant		62,686.00
6222.2 · Inst - Teach - Specialists-SPED - Other	-	
Total 6222.2 · Inst - Teach - Specialists-SPED	-	62,686.00
6231.1 · Substitutes-Other Teach Service	-	
6232.1 · Inst - Asst - GE	296,868.47	
6232.10 · Substitutes - Inst Asst - GE	5,000.00	
6232.2 · Inst - Asst - SPED		
6232.20 · Substitutes - Inst Asst - SPED		
6232.5 · Inst - Asst - SPED - Grants		
6232.2 · Inst - Asst - SPED - Other	-	
Total 6232.2 · Inst - Asst - SPED	-	-
6251.1 · Inst - Guidance, Psych, Testing	70,900.00	
6251.2 · Inst-Guidance, Psych, Test-SPED		
6310.1 · Pupil Services	57,800.08	
6310.10 · Substitutes - Pupil Services	700.00	
xxxx.5 · Summer School Grants		2,400.00
xxxx.5 · Summer School Grants		5,604.00
Total xxxx.5 - Summer School Grants		8,004.00
6000 · Salaries & Wages - Other		
xxxx.x - Contract adjustments	42,168.94	1,956.63
Adjusted Payroll Amount	8,331.26	
Total 6000 · Salaries & Wages	2,144,447.04	99,787.93
6900 · Payroll Tax		
6901 · Medicare	32,541.41	
6902 · OASDI	32,704.36	
6903 · MA Unemployment	44,884.70	
6904 · MA-ER Medical Contribution	2,000.00	
Total 6900 · Payroll Taxes	112,130.47	-
Total Expense	3,212,457.66	110,826.75
Net Ordinary Income	39,594.34	-
Other Income/Expense		
Other Income		
7010 · Interest Income		
Total Other Income		
Other Expense		
8000 · Depreciation		

	FY18 Budget - Draft	FY18 Grants Budget Draft
8001 · Depreciation - Buildings		
8002 · Depreciation - Capital Equip.		
Total 8000 · Depreciation		
2021 - Capital Lease Payable (Loan Principal)	93,193.00	
8010 · Capital Reserve		
Total Other Expense	93,193.00	
Net Other Income	(93,193.00)	
Net Income	(53,598.66)	-
Total Income	3,252,052.00	110,826.75
Total Expenses	3,305,650.66	110,826.75
	(53,598.66)	-