

# River Valley Charter School

## Annual Report

2003-04

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## FROM THE CHAIR

Dear Friends,

Fiscal 2004 was another successful but challenging year for River Valley Charter School. On the plus side:

- We established a new Kinderhaus for 5- and 6-year-olds that quickly proved to be a very effective, smoothly run, highly regarded program. Our Kinderhaus is a novel approach because it is a one-year program. The Montessori model is a 3-year children's house for 3-6-year-olds, but because of the way the charter school legislation is written, we can neither receive state tuition for 3- and 4-year-olds nor charge tuition for those children. Our board and administration thought long and hard about the wisdom of using the one-year model. Our decision to do so has been vindicated. We are not only providing local children with an earlier entry into public Montessori, we are also feeding our elementary program with 1<sup>st</sup>-graders who are well prepared to learn in a Montessori environment.
- We welcomed a new development director, Kristi Scarpone, to our senior staff. Kristi and the board development committee initiated a fundraising program that yielded results about 50% higher than our goal for the year and will help us to create financial sustainability over the long term.
- We revised our accountability plan to better match the new DOE guidelines and to streamline data collection and reporting.
- We completed the phase-in of the River Valley Assessment Toolset, our internal student assessment system that has been under development for the past three years. The Toolset combines the Montessori scope and sequence with the Massachusetts Curriculum Frameworks to identify learning objectives and also specifies a broad spectrum of tools for observing, measuring, and reporting individual student progress. For the first time, all the components of the Toolset came together in an efficient system this year. The faculty continues to refine it, but it is now a fully functioning, outstanding, highly replicable assessment model.
- We have disseminated best practices in both pedagogy and assessment with a major on-site seminar for area educators and presentations at conferences around the country. Under a dissemination grant from the Massachusetts Department of Education, we created a video about models of public Montessori education. Two other schools, one in Colorado and one in New York City, were featured in the film, which will soon be released.
- Our first middle-school graduates are doing well in public and private high schools and are reflecting very favorably on their alma mater.
- Our parent community showed remarkable activism with over 15,000 volunteer hours in a broad variety of venues, from board work to dory building, chaperoning camping trips, and fundraising.
- We have made progress in reaching out to the local school districts and municipalities, and hope to be on the verge of a new era of openness and cooperation with them.

Now that we have passed through most of the typical start-up difficulties, our organization is strong and flexible. The major challenges are and political and financial. This was the third

consecutive year in which we had to mobilize parents, trustees, and staff to convince state legislators to resist multi-faceted attacks on charter schools. This has diverted resources from our core mission. More critically, the annual legislative threat to our funding has forced us to budget for the worst-case scenario, not knowing our per-pupil tuition rates until after the start of the fiscal year. This makes it impossible to plan programs or hire confidently. In 2003-04, we made the difficult decision to cut Spanish entirely from our curriculum because the small amount we could afford to spend on it would have allowed for a very ineffective program. We also cut our already minimal physical education line item, giving the classroom teachers the responsibility to address PE as best they could.

River Valley is operating on an incredibly lean budget. We are proud of our ability to manage through these times, but concerned about the toll on the long-term health of the school. We are now seriously overcrowded in our leased facility. Our senior administrative staff continue to work superhuman hours and we must add more personnel to that structure soon. We have made teacher salaries and professional development our number-one budget priority, but still struggle to be competitive for the kind of faculty that make our school shine. Our dissemination activities, mandated under our charter and ingrained in our school culture, have been funded by a grant that has run its course and we lack the resources to continue them. Although we have made great strides in our fundraising efforts, we are determined not to use it all for immediate needs but rather create a base for building sustainability into our future. We sincerely hope that state funding will not erode any further but will begin to move in a positive direction with the improving economy.

We are committed to building bridges with other public education entities in our area and elsewhere. It is appalling that charter schools and district schools battle over scant resources when our purposes are fundamentally the same. We need to work together to convince federal and state legislators to provide the financial support we all need to meet their mandates—to make public education a true priority.

As a board, we remain passionately committed to public Montessori. With every passing year, we become more convinced of the efficacy of the Montessori method and its applicability to public education, and we have been diligent about spreading the word. We know that cultivating active, critical, independent, respectful, caring citizens will strengthen our society and ultimately help set our priorities straight.

Sincerely,

Katherine Moore  
Chair  
River Valley Charter School Board of Trustees

## EXECUTIVE SUMMARY

I am pleased to report that River Valley Charter School is meeting its accountability goals and continuing to mature as a learning institution. This year, our faculty has worked hard to implement the River Valley Toolset, which is the foundation for our internal assessment system. Their skills in observation, recording strategies, portfolio design, and student monitoring continue to improve, as does their familiarity with the entire assessment system. There is a strong correlation of internal student assessment by the faculty with the external tests (MCAS and Terra Nova) of individual students.

Although our overall Terra Nova Achievement Test scores were significantly above our goals in all subject areas, analysis of the tests, coupled with teacher observations, identified a weakness in reading and language at the lower elementary level. The teachers formed a study group to review the issue, and a staff member took a graduate reading course and shared the knowledge and strategies with others. At monthly study group meetings, a professor from Salem State College worked with the staff to address reading issues and teaching strategies. This helped us to establish a partnership with Salem State College. Together, we created a satellite graduate reading course that includes a Literacy Camp for River Valley students. The camp will be held this summer at the school and several of our staff will attend.

On our first goal of **academic achievement**, River Valley has attained or exceeded every goal set in our charter with one minor exception. Although we do not have specific goals for test results other than those stated in our charter, we expect our students to be above the state averages. On the 4th-grade mathematics MCAS, we had 2 percent more children performing at the “Warning” level than the state average. Although an extremely small sample size makes this result somewhat suspect, we expect our students to be performing at a higher level. Although students are performing above the state averages, additional analysis identifies potential student needs in mathematics at other grade levels. Therefore, next year’s curriculum focus will be on K-8 mathematics. Professional development time and resources will be used to concentrate on this academic area.

As part of our mission, we hold that academic performance is important, as are intellectual processing skills and personal/social development. As part of our internal student assessment requirements in our Accountability Plan, we measured and achieved all of our goals in these areas and continued to maintain our faithfulness to the River Valley charter.

River Valley’s **organizational viability** continues to strengthen as its financial management matures and our high-quality staff and students are retained. This goal has been accomplished through the hiring of a skilled development director with an engaging process of fundraising that promotes excellent public relations as well as funding. Appropriate stewardship of the school by the board of trustees and the recruitment of skilled and dedicated members, coupled with strong parent involvement, have fostered a strong support structure for our institution.

As part of our charter school charge, we represent a high quality model for public Montessori education and we are obligated to share it. Therefore, we have actively engaged in several formal and informal dissemination activities that promote our educational philosophy. Our dissemination has occurred not only at the local and state level, but at a national and even international level.

Our third goal is to remain **faithful to the unique aspects of our charter**. In accordance with our mission, we need to offer a high quality, Montessori public education. River Valley Charter School has met this challenge and has exceeded the expectations. A highly trained and seasoned teacher/instructor for a Montessori training center was contracted to do our external Montessori audit. Our auditor definitively concluded that we have met our goals of providing an authentic and complete Montessori program.

As River Valley Charter School grows, so does the depth and breadth of its connections with the Merrimack River Valley. Strong partnerships with local historical, community, cultural, and ecology organizations have continued to emphasize to our children the importance and understanding of our region. Directly related to these partnerships is the need for young people to learn the value of giving back to their cities and towns through community service. They develop both a sense of caring and the importance of place, which are strong Montessori concepts. Our children have excelled in this area of service to a point that we may need to consider raising the required minimum number of hours, since most children are reaching the goal in one to two years instead of over the course of study at River Valley Charter School.

Our students are fully prepared to succeed in future schools. Feedback from students and reports from local and regional high school educators show that our graduates are doing well. We continue to monitor our young alumni and we strongly believe that they will reach their full potential, have active civic lives, and pursue productive careers.

River Valley Charter School believes that it is fulfilling its educational promise to Massachusetts and to its families. It is an excellent model of Montessori public education with a talented group of professional educators who are supported by a strong network of parents and dedicated members of our board of trustees. Our laboratory of learning will be sustained as long as existing support and resources from the state are maintained. The future prospects for River Valley and for public Montessori are very promising.

Dr. Dale Bishop  
Director  
River Valley Charter School

## SCHOOL PROFILE

River Valley Charter School is a regional school serving Newburyport, Amesbury, Salisbury, Newbury, and West Newbury. The school is located at 2 Perry Way, Newburyport, MA 01950. We can be reached by phone at 978-465-0065, by fax at 978-465-0119, or by e-mail at [RVCSchool@comcast.net](mailto:RVCSchool@comcast.net). Our Web site is [www.rivervalleycharter.org](http://www.rivervalleycharter.org).

In 2003-04, River Valley served 288 children in kindergarten through grade 8, encompassing ages 5 to 14. In the elementary grades, each head teacher works with a full-time assistant teacher. The Middle School (grades 7 and 8), consisted of 58 students, as well as a coordinator and 4 full-time teachers. This past fall, we added a full-day kindergarten program, which we call the Kinderhaus, with 32 students.

This past school year ran from Sept. 3 to June 22, encompassing 180 instruction days and 997 instructional hours. The school's hours of operation were 8:30 a.m. to 3:10 p.m.

### Montessori Made Public

Our first priority in opening River Valley Charter School was to establish a comprehensive Montessori program that addressed each student as a distinct individual and as a whole child. This required immediate and thorough implementation of the essential elements of Montessori, as follows.

**Multi-Age Classrooms:** Three-year age spans in the elementary program and two-year spans in the Middle School maximize curriculum options, encourage cooperation, and foster self-confidence in students who serve as role models. Our Elementary I program has had the full spectrum of 6- to 9-year-olds since opening. Elementary II started with 9- to 11-year-olds and expanded to ages 9 to 12 in the second year. Middle School started in 2001-2002 with 7th grade and reached its full capacity of 7th and 8th grades in 2002-2003. The new Kinderhaus is a 1-year program due to regulatory restrictions on charter schools.

**Certified Montessori Faculty:** Our goal is for all head teachers to be Montessori certified for the age group they are teaching and for all assistant teachers to have some Montessori education. In 2003-04, 8 of 9 classrooms were headed by certified Montessori teachers.

**Montessori Materials:** Materials focus on many levels of understanding, beginning with the concrete and moving to the abstract. Materials are self-correcting and reinforce autonomy, confidence, and self-motivation. We budgeted for and acquired a full complement of the beautiful and scientifically designed Montessori materials before opening in September 1999; our budget provides for maintaining this inventory. Our teachers have been pleased with how well stocked our classrooms are.

**Classroom Design:** Classrooms are arranged in study centers, with clusters of student-sized tables and open areas for floor work. Students are allowed to move about the classroom and choose resources, working individually or in small groups. We were fortunate to be able to specify the build-out of the property we are leasing and so could design classrooms that are large, open, and light-filled and that include a "practical life" area with a sink, counters, and a tiled floor. Each class has the flexibility to set up its space as desired. While each classroom has a distinct personality, they all include live plants and animals, beautiful aesthetics, space divided according to areas of study, and a peace corner or quiet area.

**Peace Education:** Peace education is integral to the Montessori method and is woven into the River Valley curriculum—through interdisciplinary studies of other cultures, through the “fundamental needs of humans” curriculum, through studies of interdependence, and through active outreach to other communities and cultures. Our school participates in yearly peace education projects that occur within our local communities. Peace education is also evident in our approach to discipline, which is non-punitive, emphasizes protection of individual rights, and encourages students to work together to find peaceful resolution to conflicts.

**Interdisciplinary Approach:** This arises naturally from Montessori’s Five Great Lessons and from the project orientation of the Montessori curriculum. For example, two of the lessons are the Story of Language and the Story of Numbers. As young elementary children study the story of writing, they develop an understanding of grammar, imagining the first words that were uttered and what parts of speech they might have been. As they study the Story of Numbers, they might practice writing and computing in Egyptian, Chinese, and Roman numerals. This work is also integrated into continent studies.

**Long Work Periods:** A primary means of enabling focused, self-paced work in a Montessori school is the three-hour block of time devoted to study, preferably in the morning. Despite the limited school day, the demand for special subjects (art, music, foreign language, and physical education), and the difficulties in juggling schedules of part-time specialist teachers, all classrooms have the mornings undisturbed.

**Individualized Learning:** Students are respected as both unique and competent, with an innate desire to learn. They are empowered to direct their own learning within the structure of the curriculum, with the close guidance of the teacher, and with an understanding of their individual learning styles. (In many Montessori schools, teachers are referred to as guides.) Each student has an individual learning plan, the design of which he takes an increasingly active role in as he matures.

**Whole-Child Approach:** The Montessori curriculum integrates the development of self-reliance, independence, and respectfulness with academic work. As the child matures, he begins to use his personal and social skills to inform and evaluate his own work through individual and group self-assessment.

**Going Out:** A basic Montessori element is experiencing the world outside the classroom in a meaningful way. Depending on the age of the student, this can mean anything from counting fish stock in a local river or serving meals at a soup kitchen to taking stewardship of farmland or apprenticing to a tradesperson or artisan.

To the above Montessori fundamentals, River Valley Charter School adds the following elements that make it a viable public school.

**Correlated Curriculum:** The River Valley curriculum integrates the Montessori Scope and Sequence with the Massachusetts Curriculum Frameworks. This allows us to demonstrate clearly our accountability to public education standards and assures that our students will be fully prepared to enter the next phase of their education—public or private—when they graduate from River Valley.

**Parent Participation:** Because our students come to us with a variety of educational backgrounds, and because we recognize the vital role of parents in the educational process, we require parental involvement at 40 hours per year. This serves the dual purpose of educating

parents in the Montessori method, which is not yet well or widely understood, and bringing parents into the school community, where they provide critical support in all aspects of the organization—from the classroom to the boardroom.

## Parents' Alliance

The Parents' Alliance is committed to River Valley Charter School by serving our teachers and children through classroom assistance, building our community through school-wide activities, and supporting our school through fund-raising events.

Every parent at River Valley Charter School is a member of the Parents' Alliance. Together, we have volunteered more than 15,000 hours over the past school year. Our strong base of committed parents has enriched the school community in countless ways. Parents have participated on committees, organized and attended events, worked on classroom projects, chaperoned field trips, prepared meals for teachers, advocated for charter schools on Beacon Hill, and generously contributed their talents in numerous other ways.

Below are listed the many ways the Parents' Alliance contributed to the school in 2003-04.

### Community

Welcome Celebration  
Published Family Directory  
Harvest Gala  
Concert Refreshments  
PA Meeting Speakers  
Conflict Resolution Workshop  
After-School Enrichment  
Skate Night  
Earth Day Speakers  
Grandparents' Day Support  
Year-End Picnic

### Service

Classroom PALS  
Staff Luncheons  
Teacher Meals-To-Go  
Green Team/Recycling  
Trick-or-Treat for Unicef  
Winter Coat Drive  
Gifts for Women's Center  
Dove Peace Mural  
Orphanage Clothing Drive  
Earth Day Clean-Up  
Origami Demonstration  
TJ Wheeler Blues Program  
Sea Shanty Workshop

### Support

Wrapping Paper Sales  
Book Fairs  
T-Shirt Sales  
Playground Toys  
December Gift Wrapping  
Class Budget Gifts  
Keyboard for Music Dept.  
Rose Fundraiser  
Added to Librarian Funding  
Purchased Library Books

## SCHOOL PERFORMANCE

### Mission

The mission of the River Valley Charter School is to provide a rigorous academic program based on the Montessori philosophy and rooted in the history, culture, and ecology of the Merrimack River Valley. Students will reach their full potential as scholars and become self-reliant, productive members of society. They will be adept at critical thinking and creative problem solving and will be fully prepared to succeed in future schools, careers, and civic life.

### Goals

River Valley has established the following goals to reflect both the school's internal mission and its duty as a Commonwealth charter school:

1. *Strong academic achievement, including not only traditional subject areas but also critical thinking, creative problem solving, and high levels of personal and social development.*
2. *Organizational viability*
3. *Faithful adherence to the unique aspects of the charter mission:*
  - *The Montessori philosophy*
  - *Strong curricular and service connections with the Merrimack River Valley region*

The following sections report on our progress toward these goals as well as additional data. The numbered items correspond to the River Valley Charter School Accountability Plan dated February 10, 2004, on file at the school and at the Massachusetts Department of Education.

#### Goal 1: Academic Achievement

While we can neither predetermine nor specifically characterize each student's full scholarly or personal potential, we can expect to see evidence of it through attainment of a well-designed curriculum and assessment system. The River Valley Assessment Toolset combines the Montessori scope and sequence with the Massachusetts Curriculum Frameworks, and provides integrated learning objectives for each of the planes of development served by the school.

#### **Outcomes**

We expect at least 80 percent of our students to meet or exceed the documented learning objectives for each of the four levels (Kinderhaus, Elementary 1, Elementary 2, and Middle School) in each of six defined curriculum areas.

The results for 2003-04 are as follows:

In all of the six defined curriculum categories—mathematics, language arts, cultural (science and humanities), critical thinking, creative problem solving, and personal and social development—students have not only met but have dramatically exceeded our exit level expectations.

These assessments are determined by the classroom teachers based on information from student portfolios, daily observations and recordings, curriculum tracking sheets, and progress reports, all components of the River Valley Toolset.

<b>Percent of Students Who Met or Exceeded Documented Learning Objectives</b>				
	Kinderhaus	Elementary 1	Elementary 2	Middle School
<i>1.1 Mathematics</i>	94	87	100	97
<i>1.2 Language Arts</i>	94	97	100	100
<i>1.3 Cultural (Science and Humanities)</i>	97	97	97	100
<i>1.4 Critical Thinking</i>	97	90	97	100
<i>1.5 Creative Problem Solving</i>	97	97	100	100
<i>1.6 Personal and Social Development</i>	88	94	97	95
<i>1.6.1 Self-Motivation</i>				
<i>1.6.2 Self-Reliance</i>	97	94	100	100
<i>1.6.3 Respect For the Prepared Environment*</i>	97	100	100	95
<i>1.6.4 Community Service*</i>	n/a	100	100	97

\* Notes to the table:

- 1.6.3 *Respect For the Prepared Environment:* By this we mean exhibiting appropriate behaviors so that every student can focus on learning; respect for the learning environment and materials, respect for others, and completion of the work cycle
- 1.6.4 *Community Service:* The original River Valley Charter School Accountability Plan required that students perform a certain number of community service hours at various exit levels of their education. All of our 3rd-year (32 students) and 6th-year (36 students) have met or exceeded their community service goals. The 3rd-years needed a minimum of 15 cumulative hours and the 6th-years needed 30 hours. The Middle School students needed to acquire a grand total of 50 cumulative hours during their time at school. All of the 38 Middle School students but one had acquired the desired number of hours, which means that more than 97 percent of the students had achieved the goal. Overall, 105 out of 106 River Valley Charter School exit level students, or more than 99 percent of our students, reached their goal. These goals were achieved with only two years of data.
- Further analysis reveals that the 38 graduating Middle School students performed more than 4,033 hours of community service during the last two years, for an average of more than 106 hours per child and more than 53 hours per year. Thus, in two years, they had exceeded what was expected to take more than eight years to achieve

### ***Educational Audit***

Dr. Mary-Lou Breitborde from Salem State College was commissioned to assess the academic performance of River Valley Charter School in the context of national public education. Her 2002-03 evaluation focused on the following:

#### **Evidence of River Valley Charter School curriculum alignment with the Massachusetts Curriculum Frameworks:**

“There is much evidence to suggest that RVCS curriculum and assessment reflect the content and performance standards contained in the Massachusetts Curriculum Frameworks. Review of teachers’ curriculum plans and Student Record Forms, as well as classroom observations and teacher interviews, indicate a willingness and ability to integrate Montessori approaches and materials with state curriculum guidelines.”

**Evidence of teaching-learning activities that aim at content-rich knowledge:** “Frameworks-related content is taught in deep, meaningful, multi-modal ways enhanced by clear guidelines, structures and carefully designed concrete materials.” Some examples include: “...the structured writing program; carefully designed concrete materials for mathematics concepts such as place value, reading/writing numbers, fractions and mixed numbers, and solving equations; and guided field trips to such sites as Joppa Flat, the historic Lowell Boat Shop and Museum, and the Essex Shipbuilding Museum with follow-up applications.”

**Evidence of RVCS’ ability to respond to the learning needs of all students:** “RVCS continues to demonstrate an exemplary commitment to including students in its regular educational programming. Students on Individualized Education Plans (IEPs) are fully integrated into all aspects of the school. This inclusion is greatly helped by the multi-grade level organization and the Montessori philosophy, which sets clear learning goals but allows students flexible time periods in which to accomplish them. Also beneficial are the multisensory and ‘metacognitive’ aspects of RVCS’ Montessori-based instruction: Concepts are presented ‘whole to part,’ always concretized in hands-on, structured and sequenced materials.”

#### **Evidence of procedures and materials for documenting student learning and progress:**

“Student progress is assessed in multiple structured ways, using teacher-designed rubrics and criteria. A comprehensive multi-faceted ‘toolset’ documents student learning and performance at each level. Of particular note are the juried exhibitions conducted by Middle School students to present evidence of their academic and personal growth.”

**In summary:** "RVCS staff and administration should be commended for the school's high standards, the depth of curriculum and the effectiveness of instructional approaches and materials, and attention to students' academic and personal development. It continues to foster a peaceful and purposeful community of learners, and an ongoing commitment to school-wide self assessment and reflection."

### ***Standardized Test Results***

River Valley administers the Terra Nova test every year to every student. It also administers the MCAS as required by the Commonwealth of Massachusetts. Because test scores do not constitute outcomes in and of themselves, we do not have specific goals for test results beyond what is stated in the school charter (“significantly above state and national averages”). Rather, we use test results as an analytical tool to aid in setting future goals with the child. These results are also monitored over time to see the child’s progress and to determine appropriate instructional strategies.

River Valley Charter School has achieved Adequate Yearly Progress according to the No Child Left Behind Act.

TERRA NOVA

Results for this year’s Terra Nova testing indicate that the average student in each of grades two through eight has a National Percentile Total Score of at least 68 (which occurred in our 3rd-grade class) to as high as 85 (which occurred in our 4th-grade class).

For all groups taking the Terra Nova, except the 3rd-grade class, River Valley students exceeded the national average on their total score (comprised of reading, language arts, and mathematics) by at least one standard deviation. The results demonstrate that our students significantly exceeded the objective set out in our charter.

<b>National Percentile of the Mean Normal Curve Equivalent</b>		
	<i>n</i> =	Percentile
2nd Grade	38	76
3rd Grade	32	68
4th Grade	31	85
5th Grade	32	81
6th Grade	36	83
7th Grade	19	80
8th Grade	39	82

We performed a thorough analysis of the Terra Nova scores for all categories tested—reading, language arts, mathematics, science, and social studies—with the following results.

<b>National Percentile of the Normal Curve Equivalent</b>							
	2nd Grade	3rd Grade	4th Grade	5th Grade	6th Grade	7th Grade	8th Grade
Reading	75	64	87	85	82	88	80
Language	62	64	78	76	80	79	83
Mathematics	80	73	79	76	82	62	77
Total Score (comprised of reading, language and mathematics)	76	68	85	81	83	80	82
Science	85	74	85	85	83	76	79
Social Studies	68	71	78	89	79	79	75

The performance of our 3rd-year students indicates that additional support services in all subject areas would be best applied to this grade. Our 2nd-grade students would benefit from additional support services in language arts. Our 7th-grade students would benefit from additional support services in mathematics.

MCAS

River Valley Students in grades 3 through 8 participated in the MCAS test in spring 2003. The results of these tests have been compared to state averages, as well as analyzed longitudinally to identify possible weaknesses of our program. Following is a table of scores for the spring 2003 MCAS for both River Valley and the state. Note the very small *n*, or sample size.

Percent of Students Scoring in Each Category									
	River Valley				State				
	<i>n</i> =	Percent				Percent			
		A	P	NI	W	A	P	NI	W
3rd-Grade Reading	32	na	75	25	0	na	63	30	7
4th-Grade ELA	34	9	62	29	0	10	45	34	10
4th-Grade Mathematics	34	6	35	41	18	12	28	43	16
5th-Grade Science and Technology/Engineering	36	22	33	33	11	18	33	34	15
6th-Grade Mathematics	20	0	45	35	20	16	26	32	26
7th-Grade ELA	41	24	63	12	0	8	57	28	7
8th-Grade Science and Technology/Engineering	24	8	54	33	4	4	28	37	31
8th-Grade Mathematics	24	8	50	33	8	12	25	30	33

*Key: A=Advanced P=Proficient NI=Needs Improvement W=Warning*

For every test given, with the exception of the 4th-grade mathematics test, *River Valley had fewer students in the Warning category than the state.* In fact, for three test administrations (3rd-grade reading, 4th-grade ELA, and 7th-grade ELA), River Valley had no students scoring in the Warning category. In the 8th-grade test administration, River Valley had a significantly lower percentage of students in the Warning category than the state.

<b>Percentage of Students in Warning Category</b>		
	<b>River Valley</b>	<b>State</b>
3rd-Grade Reading	0	7
4th-Grade ELA	0	10
4th-Grade Mathematics	18	16
5th-Grade Science and Technology/Engineering	11	15
6th-Grade Mathematics	20	26
7th-Grade ELA	0	7
8th-Grade Science and Technology/Engineering	4	31
8th-Grade Mathematics	8	33

For every test administered, with the exception of 4th-grade mathematics, River Valley had proportionally fewer students scoring in the lower two categories combined (Needs Improvement and Warning) than the state.

<b>Percentage of Students in Needs Improvement and Warning Categories Combined</b>		
	<b>River Valley</b>	<b>State</b>
3rd-Grade Reading	25	37
4th-Grade ELA	29	44
4th-Grade Mathematics	59	55
5th-Grade Science and Technology/Engineering	44	49
6th-Grade Mathematics	55	58
7th-Grade ELA	12	35
8th-Grade Science and Technology/Engineering	37	68
8th-Grade Mathematics	41	63

For every test given, except for the 5th-grade science and technology/engineering test where the percentages were equal, River Valley had proportionally more students scoring in the Proficient category than the state.

<b>Percentage of Students in Proficient Category</b>		
	<b>River Valley</b>	<b>State</b>
3rd-Grade Reading	75	63
4th-Grade ELA	62	45
4th-Grade Mathematics	35	28
5th-Grade Science and Technology/Engineering	33	33
6th-Grade Mathematics	45	26
7th-Grade ELA	63	57
8th-Grade Science and Technology/Engineering	54	28
8th-Grade Mathematics	50	25

For every test administered, River Valley had a higher percentage of students scoring in the upper two categories combined (Advanced and Proficient) than the state.

<b>Percentage of Students in Advanced and Proficient Categories Combined</b>		
	<b>River Valley</b>	<b>State</b>
3rd-Grade Reading	75	63
4th-Grade ELA	71	55
4th-Grade Mathematics	41	40
5th-Grade Science and Technology/Engineering	55	51
6th-Grade Mathematics	45	42
7th-Grade ELA	87	65
8th-Grade Science and Technology/Engineering	62	32
8th-Grade Mathematics	58	37

*Notes:*

- River Valley students show significant strength in English/Language Arts at all test levels.

- In 3rd-grade reading, 4th-grade ELA and 7th-grade ELA, no River Valley students score in the Warning category.
- In science and technology/engineering, the overall state percentage of students performing well (i.e., in the Advanced and Proficient categories) *decreases* from 5th-grade students to 8th-grade students (from 51 percent to 32 percent). In contrast, the percentage of River Valley students performing well *increases* from 5th-graders to 8th-graders (from 55 percent to 62 percent).
- At the upper grades, River Valley has a greater proportion of its students scoring higher in mathematics (e.g., 41 percent in advanced and proficient in 4<sup>th</sup> grade; 45 percent in 6<sup>th</sup> grade, and 58 percent in 8<sup>th</sup> grade).
- While the percentage of students performing poorly on mathematics tests is greater for the state at higher grade levels, it is lower for River Valley. The state has an increasing percentage of students in the Warning category (16 percent in 4th grade, 26 percent in 6th, and 33 percent in 8th); River Valley has 18 percent, 20 percent and 8 percent respectively.

## **Goal 2: Organizational Viability**

River Valley strives to provide a strong and reliable infrastructure to support the school's learning community in both the short and long term. We look at our organizational performance in six categories: finance, staffing, enrollment, governance, dissemination of best practices, and family participation.

### ***Finance***

We measure financial health in terms of both sound fiscal management and development of financial resources.

#### ***2.1 Sound financial management***

The budget presented for the 2003-2004 school year was based on an expected enrollment of 288 children. River Valley Charter School continued to offer an exceptional academic program despite a recent economic decline in Massachusetts. Through careful planning and financial management, our budget remained balanced.

When our previous financial materials (2002-2003) were audited, there were no material findings. Furthermore, the auditors determined that, based on their audit of the River Valley Charter School statements, there were no reportable conditions and no instances of noncompliance.

#### ***2.2 Progress toward financial independence from changing economic and political climates***

Despite ongoing changes in the political climate, River Valley Charter School continues to move toward financial independence. As stated in the 2003-04 budget (as revenue raised through the River Valley Charter School Foundation), the annual development goal for this year was \$90,000. The development committee generated about \$130,000 from the annual appeal, spring ask event, and auction, which significantly moved us toward our financial and political goals. Our fund-raising plans for the coming year are already in progress, with even higher expectations.

## **Staffing**

A thriving professional community is critical to the success of River Valley. We measure performance in this category in terms of staff retention rates as well as professional development opportunities.

### *2.3 Long-term retention of highly qualified faculty and administration*

<i>School Director</i>	<i>Dr. Dale A. Bishop</i>
<i>Assistant Director</i>	<i>Ann Mooney</i>
<i>Director of the Middle School</i>	<i>Lisa Camp</i>
<i>Development Director</i>	<i>Kristi Scarpone</i>
<i>Business Manager</i>	<i>Debbi McCrevan</i>

There has been no turnover on the administrative team this year. Only one member (4 percent) of the full-time teaching faculty employed by the school left during the school year. Four full-time teachers/assistant teachers (16 percent) finished the 2003-04 school year but will not be returning in the fall.

Our retention rate for administration and faculty combined was 83 percent.

Of our head teachers, 87 percent are Montessori trained for the level at which they teach. The percentage is not 100 because a Montessori-trained teacher left during the school year and that teacher's replacement has not completed training. This new teacher is, however, currently engaged in Montessori training.

### *2.4 Professional development opportunities for faculty and administration to meet the needs of the school*

This past year, 100 percent of our faculty and administration met individual professional development goals. Documentation of professional development activities and faculty goal-setting is on file at the school.

## SUMMARY OF TEACHER QUALIFICATIONS

River Valley employs 30.19 FTE teachers and aides. According to the No Child Left Behind regulations, 90 percent of our teaching staff is considered "highly qualified."

<b>Full-Time Equivalent (FTE) Teachers and Aides</b>		<b>Total</b>
Kinderhaus:	2 head teachers, 1 assistant teacher	3
Elementary I:	4 head teachers, 4 assistant teachers	8
Elementary II:	4 head teachers, 4 assistant teachers	8
Middle School:	math, science, humanities, language arts (1 each), 1 coordinator	5
Special Education:	1 coordinator/teacher (1.0) and 3 special ed. Teachers (.53, .26, and .66)	2.45
Specialists:	1 art teacher (.32), 1 after-care coordinator (.5), 2 music teachers (.27 and .5), 1 librarian (.05), and 4 special ed. assistants (two at .32, one at .46, and one at 1.0)	<u>3.74</u>
		30.19

Our staff averages a total of 6.3 years of teaching experience and 2.5 years of service with the River Valley Charter School.

The average class size at the elementary levels is 25 students; in the Kinderhaus it is 16; in the Middle School it is 15. The apparent discrepancy between the elementary classrooms and the Kinderhaus and Middle School has to do with how those programs are structured. Although our elementary class size is 25 and our Kinderhaus is 16, we also employ a full-time, highly trained assistant teacher in each classroom. The actual student-teacher ratio is 12.5 for elementary classes and 10.7 for Kinderhaus.

### ***Enrollment***

River Valley maintains two major enrollment objectives—one for the waitlist and one for returning students:

- 2.5 *Wait list adequate to meet the school enrollment objective of at least two applications per opening each year*

This year is marked by the start-up of our new 5-year-old program called Kinderhaus. Approval for an additional 32 students for this age group brought the total school enrollment up to 288. Adding this program means that the entry point for children has changed from 1st-year students to Kindergarten-aged students.

Withdrawals over the summer of 2003 equaled 16 with an additional 5 after the school year began in September. The breakdown of total openings is as follows:

Kinderhaus	32
Graduating Students	24
Withdrawals	<u>21</u>
Total	77

Applications that were lottered in February and March (Kinderhaus) numbered 136. The existing waitlist prior to these lotteries numbered 16. Additional applications collected between the February 2003 and February 2004 lottery numbered 39. The total applications available for this school year was 191. For 77 openings, that is a ratio of 2.5 applications per opening in the school.

Lottery Applications 2003-04										
		Grade								
Town	TOTAL	K	1	2	3	4	5	6	7	8
Amesbury	17	7	4	2	0	1	3	0	0	0
Newbury	20	5	5	1	1	1	3	3	1	0
Newburyport	57	27	15	3	3	3	5	1	0	0
Salisbury	9	3	3	2	0	0	0	1	0	0
West Newbury	9	0	3	1	0	1	0	2	2	0
<b>Total</b>	<b>112</b>	<b>42</b>	<b>30</b>	<b>9</b>	<b>4</b>	<b>6</b>	<b>11</b>	<b>7</b>	<b>3</b>	<b>0</b>
Non-Residents	24	5	3	7	1	3	3	1	0	1
<b>Grand Total</b>	<b>136</b>	<b>47</b>	<b>33</b>	<b>16</b>	<b>5</b>	<b>9</b>	<b>14</b>	<b>8</b>	<b>3</b>	<b>1</b>

River Valley has an enrollment policy that permits us to receive applications at any time during the year. These are logged and filed for the next annual lottery usually held in February. In the event that there are more openings in an age group than names on the waitlist, then these applications may be placed into a special lottery and used to fill the openings. Once an application is lottered, it is added to the waitlist under existing names within its particular age grouping.

Applications Between 2003 & 2004 Lotteries								
	Grade							
K	1	2	3	4	5	6	7	8
5	7	3	6	5	3	6	4	0
<b>Total: 39</b>								

*2004-2005 Applications*

The current waitlist includes any names not used during this past year; applications lottered in February 2004 minus students who have been offered positions or those who have declined positions for school year 2004 – 2005 (43); plus applications received since that time until July 1, 2004. They total 212 and are detailed in the chart below.

Current Waitlist								
Grade								
K	1	2	3	4	5	6	7	8
51	24	13	33	11	26	16	13	0
<b>Total: 187</b>								

Applications Since 2004 Lottery								
Grade								
K	1	2	3	4	5	6	7	8
5	4	1	2	2	4	4	3	0
<b>Total: 25</b>								

2.6 *High rate of returning students—at least 85 percent of non-graduates*

Comment:

For the 2003-04 school year, we had a total of 264 non-graduate students who would have been returning in the fall. Of these 264 students, 18 (or 7 percent) transferred before school began, giving RVCS a retention rate of 93 percent of non-graduate students.

Eighteen students have left River Valley since our last Annual Report. Dates and reasons for transferring for these students are listed below.

In addition, the school learned of seven students at the time of this report who had finished the 2003-04 school year but would not be returning in the fall. The reasons for withdrawal given for these students were: Relocation (3), the need for more structure (3), and wanted to attend local school (1).

<b>Student Turnover 2003-04</b>		
<b>Student</b>	<b>Date of Transfer</b>	<b>Reason for Transfer</b>
1	6/19/03	To attend local school
2	6/24/03	Relocated out of state
3	6/24/03	Relocated out of state
4	6/24/03	Program does not meet child's needs
5	8/06/03	Relocated out of state
6	8/06/03	Concerns regarding curriculum
7	8/06/03	Wanted more structure
8	8/14/03	To attend local school
9	8/14/03	Family wanted a change
10	8/14/03	Wanted sports/to be with friends
11	8/29/03	Lack of confidence in curriculum
12	8/29/03	Lack of confidence in curriculum
13	8/29/03	To attend local school
14	9/15/03	Wanted to attend local school
15	10/06/03	Safety and emotional well-being of child
16	10/31/03	Relocated out of state
17	1/05/04	Wanted more structured curriculum and larger social environment
18	3/16/04	SPED team agreement

As students get older, the reasons for transfer relate to social needs and are less academic. This matches the sensitive period of Montessori for social development in the period from childhood to adolescence. Changes of school in the older students reflect the search for alternatives by families, the inability of the child to adjust to the independence required for the academic program, and to the timing of the other community schools' entrance requirements.

## OTHER STUDENT INFORMATION

Total Enrollment as of June 22, 2004	288
Average attendance rate	272.28
Average membership rate	286.16
Expulsions	0
In-school suspensions	0
Out-of-school suspensions	7 (2 cases of unwanted physical contact, 2 cases of hitting and kicking, 1 case of stealing, 1 case of threatening behavior, and 1 case of hitting another student)

Student Demographics		
	Number	Percent
Boys	138	48
Girls	150	52
White	277	96
	6	1
Hispanic	3	1
Black	1	1
Chinese	1	1
Limited English proficient	0	0
Linguistic minorities	0	0
Students enrolled in special education	66	23
Free or reduced-price lunches	6	2

## Governance

River Valley has one overarching goal for its governance structure:

### 2.7 *The board of trustees should provide appropriate stewardship of the school*

The Accountability Plan establishes three measures for this outcome:

- *Achievement of all goals as set during annual board retreat.* The board set five goals for fiscal 2004:

1. Open the Kinderhaus: This was an extremely ambitious goal, given a short timeline due to legislative and budget uncertainties at the state level. Although it was set as a board goal, it was really an administrative task, and the assistant director was able to hire teachers, develop the program, and rally parents to help finish the classroom

space over the summer. The program is a stunning success; word of mouth was so positive that there were 82 applications for 32 spaces for the 2004-05 school year.

2. Purchase 2 Perry Way and build out the space: The one adverse impact of the Kinderhaus is that it exacerbated an already overcrowded situation. The building we occupy has additional space but the cost of leasing and building it out is prohibitive. The site committee spent most of the year working with a financial consultant to determine the feasibility of purchasing the building. In late spring, the current owner decided he is not interested in selling now or in the next few years. We are exploring every option for using incremental space in the building until we can develop a plan for finding and funding a facility that will meet our needs.

3. Continue refining and implementing the Accountability Plan: When the Massachusetts Department of Education's Charter School Office released its draft of new accountability guidelines, it became clear that we could significantly streamline our plan to focus on true critical outcomes, while saving the school administration many hours of unnecessary data collection and reporting. The board approved the revised Accountability Plan in February, and it is now on file with the DOE. The accountability committee has begun to focus more on overseeing the accountability process now that the plan is well in place.

4. Become an effective development board with 100 percent participation by trustees: The legislative battles and state budget crises of the past two years have solidified our determination to build a culture of giving within our community, so that we can weather the state funding vicissitudes without decimating our programs. We have progressed from a board that did not fully comprehend the need for fundraising to one in which, this year, every trustee contributed financially. This helped create the springboard for our overall development program, which raised over \$130,000 compared to the \$90,000 goal.

5. Build the school community; create a board committee to lead the effort: We created the community building committee, which was very effective in orchestrating a variety of school activities to encourage more contact among trustees, faculty, families, and students. There were two board/faculty socials, a back-to-school social for parents and faculty, three major school-wide events, two student concerts, and an open house for grandparents and friends on the calendar this year, in addition to individual classroom events and various ceremonies such as graduation. The committee also concerned itself with finding ways to enhance the school culture and environment according to the Montessori model.

▪ *Less Than 25 Percent Intra-Term Trustee Turnover*

One trustee resigned this year before his term expired, due to increasing career responsibilities. This translates to 5 percent turnover.

▪ *Biannual External Audit of Board Operations*

This measure is new under the revised Accountability Plan, and the first audit will occur in fiscal 2005.

The board made the following major policy decisions this year:

- To make available for distribution KI pills, in the event of a nuclear disaster, to those children whose parents have signed a consent form (September 2003)
- To approve a revised 2003-04 school budget as proposed by the finance committee (September 2003)
- To adopt the revised River Valley Charter School Accountability Plan as proposed by the accountability committee (February 2004)
- To adopt the River Valley Charter School Conflict of Interest Policy as proposed by the committee on trustees (February 2004)
- To support the intent of the River Valley Charter School Foundation to purchase 2 Perry Way and to affirm the intent of the board of trustees to lease the building (March 2004)
- To approve the fiscal 2005 school budget as proposed by the finance committee (June 2004)

The board received no formal or official complaints in 2003-04.

The River Valley Charter School Board of Trustees for 2003-04 included 16 voting members and three non-voting members, as follows:

Name	Board Position	First Term Elected	First Term Length	Term Expires	Term Limit Complete	Affiliations	Committees
<b>Dr. Dale Bishop</b>	<i>Director*</i>	Jul-01	(1 yr)	Annually		School director, River Valley CS	Executive, Finance, Accountability, Development
<b>Lucinda Cathcart</b>	<i>Trustee</i>	Jul-03	(3 yrs)	Jun-06	Jun-09	Textile artist; designer; retail business owner; Firehouse Center for the Arts, Institute for Savings Board of Incorporators	Development, Finance
<b>Debbie Davies</b>	<i>Trustee</i>	Oct-01	(3 yrs)	Jun-07	Jun-07	Teacher, Davis School, Bedford, MA	Accountability
<b>Joseph Donnelly</b>	<i>Trustee</i>	Sep-02	(1 yr)	Jun-06	Jun-09	Director of Stewardship, Northeastern University	Development, Grievance

<b>Terri Doucet</b>	<i>Faculty Trustee*</i>	Jul-03	(1 yr)	Annually		Elementary classroom teacher, River Valley CS	
<b>Clare Dowd</b>	<i>Trustee</i>	Jul-03	(3 yrs)	Jun-06	Jun-09	International business consultant, Global Connection Inc.	Development, Grievance
<b>Claire Dunbar</b>	<i>Trustee</i>	Jul-02	(3 yrs)	Jun-05	Jun-08	Nurse Practitioner, Harvard Vanguard Medical Associates, Peabody, MA	Finance, Accountability, Grievance
<b>Chris Getz</b>	<i>Trustee</i>	Feb-99	(3 yrs)	Jun-05	Jun-05	Realtor, Carlson GMAC, River Valley CS founder	Development (chair), Site, Trustees
<b>Tom Getz</b>	<i>Accountability Officer</i>	Feb-99	(1 yr)	Jun-05	Jun-05	Teacher, Marblehead Public Schools, River Valley CS founder	Executive, Accountability (chair)
<b>Lisa Graham</b>	<i>Trustee</i>	Jul-03	(3 yrs)	Jun-06	Jun-09	Recruiting, office systems and operations	Trustees, Accountability
<b>Lucy Hulse</b>	<i>Treasurer</i>	Jul-02	(3 yrs)	Jun-05	Jun-08	CFO, Wide Horizons for Children; board of directors, Community Day Care Center of Lawrence, Inc.; Development Committee, Waring School, Beverly, MA	Development, Executive, Finance (chair), HR Policies

<b>Marianne Isgur</b>	<i>Secretary</i>	Oct-02	(3 yrs)	Jun-05	Jun-08	Recruitment, human resource management	Development, Executive, Trustees, HR Policies (chair)
<b>Kathy Jacobsen</b>	<i>Vice Chair</i>	Feb-99	(3 yrs)	Jun-05	Jun-05	Adaptive Technologies	Executive, Finance, Grievance, Site, Trustees (chair), HR Policies
<b>Heidi Kelleher</b>	<i>Trustee</i>	Jul-03	(3 yrs)	Jun-06	Jun-09	Psychiatric nurse; registered nurse	Community Building (chair), Development
<b>Ann Mooney</b>	<i>Asst. Director*</i>	Jul-01	(1 yr)	Annually		Assistant director, River Valley CS; Board of Governors, Ipswich Country Club	Development, Accountability
<b>Katherine Moore</b>	<i>Chair</i>	Feb-99	(2 yrs)	Jun-05	Jun-05	Freelance Technical Writer, River Valley CS founder	Executive, Trustees, Accountability, Finance, Development, HR Policies, Grievance, Site
<b>Elizabeth Smith</b>	<i>Trustee</i>	Oct-00	(3 yrs)	Jun-06	Jun-06	Executive Vice President, MAST Industries, Inc.	Finance, Development, HR Policies
<b>Leigh Olson Snow</b>	<i>Trustee</i>	Feb-99	(3 yrs)	Jun-05	Jun-05	Architect, JSA Architects, Inc., River Valley CS founder	Trustees, Grievance (chair), Site (chair)
<b>Lee Willingham</b>	<i>Trustee</i>	Oct-02	(3 yrs)	Jun-05	Jun-08	Vice President, Banknorth, Burlington, MA	Finance, Site
	<i>* ex officio, nonvoting</i>						

## ***Dissemination of Best Practices***

The major objective in this category is:

### 2.8 *Continue to foster River Valley Charter School as a model for public Montessori programs*

River Valley believes that dissemination is elemental to its charter. The extent to which the school has been able to disseminate has been greatly enhanced as a result of receiving the Massachusetts Department of Education Dissemination Program Grant (for the second year). Dissemination Program Grant funds enabled River Valley to engage in dissemination activities beyond press releases and open houses.

#### ***Montessori Workshop***

During the spring, River Valley hosted its second Montessori workshop for outside educators. In 2003-04, River Valley continued its efforts to solicit participation from public educators from five local towns, hoping to foster collaboration between our school and local sending districts. This year, there were more people interested in attending the workshop than there were available places.

Feedback regarding the value of the information shared and its applicability was overwhelmingly supportive. One attendee followed up the workshop with a glowing response, indicating that she had returned to her classroom the following Monday morning and had implemented a number of the Montessori principles she learned about at the workshop.

#### ***Video project: montessori made public***

The Dissemination Program Grant also funded the creation of a 20-minute dissemination video. River Valley hired a highly experienced video production firm, which specializes in the education industry, to produce the film. Besides filming for five days at River Valley, the director and film crew identified two other public Montessori schools at which additional filming could take place. One school was in Jefferson County, Colorado, and the other was an urban school in Yonkers, New York. By filming at three schools that serve students in three very different environments, River Valley hoped to dispel the myth that Montessori education only works in affluent communities.

#### ***Additional Dissemination Activities***

River Valley also participated in other dissemination activities, including presenting at conferences, increasing newspaper presence, creating a community outreach program, participating in political action campaigns, and hosting numerous tours of the school.

**Conferences:** Administrators and educators presented on juried exhibitions at the New England League of Middle School's annual conference in Rhode Island, the Massachusetts Charter School Association's Best Practices Showcase, the annual American Montessori Society conference in Boston, the North American Montessori Teachers' Association Adolescent Retreat in Cleveland, as well as parent education at the Wallace Foundation Leadership Conference in Portland, Oregon. In addition to creating a partnership with Salem State College and being a satellite campus for a graduate reading course and literacy camp, the director and faculty have made a series of presentations on Montessori education each semester. Graduate students in these classes

consist of local and regional teachers who were quite interested in this pedagogy and some have come to visit the school as a result of the seminars.

**River Valley Views:** We created a systematic and regular community outreach program called River Valley Views last fall. The monthly events associated with this program bring approximately six to 12 community members into the school for a one-hour tour and discussion. The Views have been very successful, and we have been able to welcome and inform individuals who previously had limited or no connections to the school.

**Individualized Tours:** There have been many opportunities to provide personalized tours of our school. Most notable this year, River Valley hosted a visit by two professionals from Tasmania. The Tasmanian Education Board sent these board members to the U.S. to learn about alternative educational approaches in the hopes of strengthening the Tasmanian School System.

#### THE FUTURE OF DISSEMINATION AT RIVER VALLEY CHARTER SCHOOL

River Valley will continue its commitment to dissemination, albeit on a much smaller budget than in the past. Planning and implementation of a plan for the widespread distribution of the *montessori made public* video will be one of the major focuses of next year's dissemination activities.

#### ***Family Participation***

Families are a critical component of River Valley's organizational viability. Family support helps us provide many school activities and programs that would not occur otherwise. We have the following expectations for family involvement:

##### *2.9 High levels of family participation at all levels of school life*

A goal of attaining high levels of active family participation, both in community service and by financial contributions, is a major component of our Accountability Plan.

This year, 159 out of 199 families recorded 15,076 hours of service, for an average of 94 hours per family. At 80%, this exactly meets our goal for family participation.

Furthermore, each of our 199 families is required to perform a minimum of 40 hours, and our goal was set at a minimum of 60 percent (or 96 families) who would attain this objective. This year, 42 families, or 21 percent, completed their required 40 hours of parent participation. This means we did not meet our goal and shows that more parents need to share the responsibilities. This can be a parent focus for the forthcoming year.

##### *2.10 High percentage of families contributing financially to the school*

We expect that 50 percent of our families will give to our Annual Giving program. This year, 111 out of 199 families contributed, for a rate of 56 percent, which exceeds our expectation.

The level of family participation is directly related to the success of an institution. River Valley Charter School continues to embrace family involvement and cites our parent participation rates as a major factor in our ability to provide high-quality education.

### Goal 3: Faithfulness to the Unique Aspects of the Charter

River Valley's mission is to provide an authentic and complete Montessori program within the public sphere. It is also to integrate regional history, culture, and ecology into the learning process, so that students become aware of both the larger world beyond school and their places in it. This, in turn, is key to the last part of the school mission, which is preparedness for future schools, careers, and civic life.

#### *3.1 Meet nationally recognized standards for high-quality Montessori education*

River Valley Charter School continues to maintain a strong working relationship and professional affiliation with the American Montessori Society. We are certified associate members and we actively support the organization. This year, the AMS National Convention was held in Boston, and a team of River Valley Charter School staff did a major presentation titled "Celebrations of Learning." In addition, several of our faculty members attended the conference.

Rob Keys from the Seacoast Center for Education in New Hampshire was commissioned to assess our status and progress vis a vis the "Essential Elements of Successful Montessori Schools in the Public Sector," a checklist endorsed by major Montessori accrediting organizations and by the River Valley Charter School Board of Trustees. His 2003-04 evaluation focused on the following:

#### ***Montessori Teachers***

"The teachers at RVCS appear to be one of the school's greatest assets. Teachers at K-6 levels possess the proper credentials for their classrooms. While the Middle School faculty do not, the program is coordinated by a Montessori trained teacher, and the faculty are well-qualified for the positions they hold."

"Ongoing professional development is a strength of RVCS and it is maintained in a variety of ways."

"RVCS seeks assistant teachers who in many cases exceed the teaching experience, but not the credential, of their head teacher. This blending offers a much more positive classroom model."

#### ***Administration***

"RVCS has experienced just one major change in administrative staff in its first five years. While I've been privileged enough to see tremendous growth from those first months, it is clear that the commitment to a core Montessori culture has remained unchanged."

#### ***Recruitment/Parent Education***

"RVCS consistently not only meets the standard of providing programs, but exceeds their stated goals for parent satisfaction, parent volunteerism, annual giving, and parent understanding. Further, the community actively presents issue-oriented forums, and 'Journeys of Understanding.' An astounding 97 percent of parent respondents were 'very or somewhat satisfied' with the quality of their child's experience..."

### ***Curriculum/Environment***

“All classrooms appear to be fully equipped with the necessary Montessori materials. In fact, many E2 classrooms have additional 6-9 Montessori materials not normally present in 9-12 environments.”

“My observations revealed a strong commitment to uninterrupted daily work periods of at least 90 minutes, and in many cases the entire morning.”

### ***Assessment***

“RVCS appears to have taken a leading role in the area of assessment. The RVCS Toolset, a strong component of the school’s charter, represents hundreds of hours of development. It describes a ‘cycle of assessment’ including individual learning plans, daily observation and recordings, curriculum progress tracking sheets, portfolios, and progress reports. RVCS has almost quite literally ‘written the book’ on assessment in public Montessori.”

### ***Professional Development***

“RVCS maintains a budget of nearly \$20,000 for Montessori workshops and conferences.”

River Valley has not only met the "Essential Elements of Successful Montessori Schools in the Public Sector," but in fact has exceeded the expectations set forth in that document. Our school is continuing to refine its design and strengthen its model of public Montessori education

- 3.2 *Acquire and maintain community partners for both curriculum and service in our surrounding region. River Valley teachers will individually cultivate curriculum partners, as well as create opportunities for community service.*

### ***Curriculum Partnerships***

The River Valley Charter School community has remained faithful to its charter through the acquisition and maintenance of community partners for curriculum and service.

In conjunction with the Banks Dory Project at Lowell’s Boat Shop and the Newburyport Maritime Society and with financial support from the Provident Foundation, the students built a 19-foot authentic replica of the dories used in the fishing industry during the 19<sup>th</sup> century. Students learned about the boat’s design, the music, dress, and culture of these times, as well as how to use tools to construct the craft. Additional partnerships with the Hull Lifesaving Museum in Hull, MA, and Salisbury’s Ring Island Rowing Club have further supported this project and led to its success. Students learned to row properly, got tours of the Boston Harbor Islands, and visited the museum. This project culminated in a school-wide launch celebration held at Cashman Park on the Merrimack River.

In Elementary 1, students have visited the Heritage House, a senior citizens community in Newburyport, exchanging cards, meeting with the residents, and cleaning up the grounds. They have partnered with Society for the Preservation of New England Antiquities and created a 17<sup>th</sup>-century local herbal/kitchen garden at the Spencer Pierce-Little Farm. They have participated in the Global Art Project and the Dove Project to foster national and local support for global unity. One class joined with the Women’s Crisis Center to support their Literacy Project by collecting and gift wrapping books for the Amesbury and Newburyport shelters as well as an elementary school in Seabrook,

NH. Some children assisted the Newburyport Public Library's Read Aloud Project by reading to pre-schoolers and toddlers for several weeks. At the Country Manor Nursing Home in Newburyport, the students planned, designed, and planted a butterfly garden. At the dedication ceremony, the children sang songs and did a play for the seniors about what they had learned about butterflies.

Another class had a year-long partnership with Merrimack Place, which is a local assisted-living facility. The adults read to the children and the children did service projects for the adults. In addition, the residents came to visit River Valley twice for student-prepared meals.

Every Monday, a group of Elementary 1 children visited a local Headstart project and read and shared literature with the younger children. Another partnership of that class was with the Amoskoeg Fish Ways. The students raised 100 Atlantic salmon in the class, studied this species of endangered fish and their migration, and then released them into the Merrimack River. These children also formed a partnership with the city's animal control officer, who came to the school to educate our children about domestic and wild animals. In return, they gathered food and supplies for the care of animals in the local shelter.

A new partnership was formed in April with the Powder House Restoration Committee in Newburyport. Students will be researching its history and helping to provide support for its restoration and future care.

Students formed a partnership with the Newburyport Public Works Department for the purpose of marking the storm drains to prevent hazardous materials from being dumped into our local environment. This same class has partnered with the Appalachian Mountain Club's Mountain Classroom Center in New Hampshire, so that they can understand more about their local environment and find other ways to care for their communities.

During the last year, some of our older elementary students have visited the residents of the Wheelwright House, which is a local residential-care facility. The children performed music, played games, and shared time with the adults.

An ongoing partnership continues with the Massachusetts Audubon Society. The class has been involved with a research study on salt marshes. The students have focused on salinity and invasive plant investigations. Several researchers have been in contact with the students and teacher about their efforts, and they have invited our teachers to workshops. Currently, the Audubon Society and the class are actively designing further student research to be done next year.

One group of students coordinated school-wide support for the Pettengill House. They gathered the food and took it to the food pantry. One student in this class collected and repaired bicycles for individuals at the Turning Point Shelter, which is a shelter for battered families.

The Wenham Museum and River Valley have been collaborating on a history project to help our students understand the history of colonial American shipbuilding.

Also at the Turning Point Shelter in Newburyport, our Middle School students regularly stocked the shelves for their food pantry, as well as helped out with the planning and

conducting of such events as their Children's Christmas Party, Special Needs Banquet, and their Fall Fashion Show.

In addition, they worked with the Maris Center in Salisbury, MA, by planning and shopping for meals. This was also a service done in partnership with Turning Point.

### ***Community Service***

This is the second year that we have been collecting data and the total number of hours and types of service are quite impressive. Some examples of the local community service projects are the Walk for ALS, Turning Point Shelter, The Angel Fund, Seacoast Science Center, Yankee Homecoming, volunteering at various summer camps, working at a local hospital, Pettengill House, Salvation Army, Walk for Cancer, Walk for Diabetes, Heritage House, S.P.N.E.A. Garden, Green Team Recycling Group, Unicef, Merrimack Place, Earth Day local sites and beach clean up, Head Start, Newburyport Animal Shelter, Clothes for Bolivia, Literacy Project, Soup Kitchen, Overlook Farm, Red Cross, Wheelwright House, winter coat donations, holiday gift tree for Women's Crisis Center, Pennies for Patients Childhood Leukemia benefit, and Shriners' fund.

In addition, many community service projects were completed within the school. Volunteer efforts include Reading Buddies, the rose fund-raising project, dory launch day planning, spreading mulch in the playground, Flag Team, concert set-up, Kinderhaus escort service, preparation for the River Valley auction and the dissemination seminar, and many other school events.

# FINANCIALS

## RIVER VALLEY CHARTER SCHOOL

### Statement of Financial Position

June 30, 2004

#### ASSETS

##### Current Assets

Cash	\$	791,006
Accounts receivable		4,569

**Total current assets** 795,575

**Capital Assets, Net** **372,044**

##### Other Assets

Deposits		34,893
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**Total other assets** 34,893

**Total assets** \$ 1,202,512

#### LIABILITIES AND NET ASSETS

##### Current Liabilities

Accounts payable	\$	15,774
Deferred grant revenue		6,586
Accrued payroll		162,207
Other current liabilities		730

**Total current liabilities** 185,297

##### Net Assets

Unrestricted:		
Invested in capital assets		372,044
Unrestricted		645,171

**Total net assets** 1,017,215

**Total liabilities and net assets** \$ 1,202,512

**\*\* Please note that this statement is preliminary (unaudited). The River Valley Charter School's financial year ends June 30, 2004 and additional adjustments may be required.**

**RIVER VALLEY CHARTER SCHOOL**  
**Statements of Activities**  
**Year Ended June 30, 2004**

		<b>July 2003-June 2004</b>
<b>Revenue and Support</b>		
Per pupil revenue	\$	2,329,226
Federal government grants		126,202
State government grants		42,594
Fundraising		13,512
Other revenue and fundraising		10,622
Program service fees		136,743
Interest income		4,987
<b>Total revenue and support</b>		<b>2,663,886</b>
<b>Functional Expenses</b>		
Program service expenses:		
Instructional program services		1,417,571
Special education program services		281,240
Other program services		223,984
		1,922,795
Supporting services:		
Fundraising		48,905
Management and general		490,587
		539,492
<b>Total functional expenses</b>		<b>2,462,287</b>
<b>Change in net assets</b>		<b>201,599</b>
<b>Net Assets - Beginning of Year</b>		<b>815,616</b>
<b>Net Assets - End of Year</b>	<b>\$</b>	<b>1,017,215</b>

**\*\* Please note that this statement is preliminary (unaudited).  
The River Valley Charter School's financial year ends  
June 30, 2004 and additional adjustments may be required.**

**RIVER VALLEY CHARTER SCHOOL**

**Statement of Functional Expenses**

**Year Ended June 30, 2004**

	Program Services			Fundraising	Management	Total
	Instructional	Special Ed	Other Prog		& General	
Salaries	\$ 803,362	164,407	76,119	43,438	336,930	\$ 1,424,255
Payroll taxes	49,972	10,154	5,086	4,362	19,030	88,603
Fringe benefits	58,655	3,019	-	-	14,538	76,213
Total salaries and related expenses	\$ 911,989	177,580	81,205	47,800	370,498	1,589,071
Occupancy	290,388	6,866	14,616	-	19,120	330,990
Telephone	1,590	454	227	-	2,271	4,543
Utilities and maintenance	69,161	1,635	3,481	-	4,554	78,832
Direct Program Contract Services	21,989	70,287	108,109	-	-	200,385
Instructional supplies and materials	19,255	8,108	8,335	-	-	35,698
Program support	-	4,936	1,180	-	-	6,116
Staff development	17,381	50	-	-	1,039	18,469
Advertising and recruitment costs	-	-	-	-	2,557	2,557
Computer supplies	4,528	563	-	469	4,280	9,841
Contract services	3,949	2,004	201	98	26,912	33,163
Dues and association fees	-	-	-	-	9,284	9,284
Equipment lease and rental	5,906	1,327	664	-	5,168	13,064
Insurance	15,477	1,555	1,120	-	6,456	24,608
Legal fees	-	-	-	-	630	630
Meals and entertainment	-	-	-	-	2,189	2,189
Office supplies and materials	9,435	1,918	960	538	7,821	20,672
Postage and printing	3,501	711	356	-	1,639	6,208
Supplies and consumable expenses	3,310	672	337	-	1,549	5,868
Travel	493				11,607	12,100
Other					882	882
Depreciation	39,219	2,574	3,193	-	12,131	57,117
<b>Total functional expenses</b>	<b>\$ 1,417,571</b>	<b>\$ 281,240</b>	<b>\$ 223,984</b>	<b>\$ 48,905</b>	<b>\$ 490,587</b>	<b>\$ 2,462,287</b>

\*\*Please note that this statement is preliminary (unaudited). The River Valley Charter School's financial year ends June 30, 2004 and additional adjustments may be required.

**RIVER VALLEY CHARTER SCHOOL**  
**Approved School Budget – Passed June 8, 2004**  
**July 2004 – June 2005**

	<b>Approved Budget Overview 2004-2005</b>	<b>% of Total Budget 2004-2005</b>
	<u>July 1, 2004-June 30, 2005</u>	<u>July 1, 2004-June 30, 2005</u>
<b>STUDENT ENROLLMENT</b>	<b>288</b>	
<b>Average Tuition Rate Per Student</b>	<b>8,097.22</b>	
<b><u>Revenue</u></b>		
State Tuition (Enrollment X Tuition)	\$ 2,332,000	90.73%
DOE Administered Grants	104,209	4.05%
Private Grants and Fundraising	110,000	4.28%
Program Fees	20,500	0.80%
Interest Income	3,600	0.14%
<b><u>Total Revenue</u></b>	<b>\$ 2,570,309</b>	<b>100.00%</b>
<b><u>Expenditures</u></b>		
Administrative Expenses	\$ 118,100	4.59%
Building Expenses	441,450	17.17%
Professional Salaries, Taxes and Benefits	1,782,776	69.36%
Program Services and Activities	75,400	2.93%
Special Education	78,500	3.05%
Other Expenses	45,083	1.75%
<b><u>Total Expenditures</u></b>	<b>\$ 2,541,309</b>	<b>98.87%</b>
<b><u>Excess of Revenue Over Expenditures</u></b>	<b>\$ 29,000</b>	<b>1.13%</b>
<b><u>Less: Capital Expenditures</u></b>		
Classroom Furniture and Equipment	\$ 3,000	0.12%
Leasehold Improvements	20,000	0.78%
Office Furniture & Equipment	3,500	0.14%
Telephone Equipment	2,500	0.10%
<b><u>Total Capital Expenditures</u></b>	<b>\$ 29,000</b>	<b>1.13%</b>
<b><u>Total Expenditures Including Capital Expenditures</u></b>	<b>\$ 2,570,309</b>	<b>100.00%</b>
<b><u>Excess of Revenue Over Expenditures With Capital Expenditures</u></b>	<b>\$ -</b>	<b>0.00%</b>