

Bloomington Montessori School

Board of Directors Meeting Minutes

March 10, 2026, 6:00 pm, Zoom

Board Members Present

- Janelle Terkhorn
- Christine Lovelace
- ~~Joanna Woronkiewicz~~
- Anne Sterling
- DeJohn Rose
- Adriana Fernadez
- Lisa Ziemba
- Alex Burch
- Elizabeth Thompson
- ~~Garrett Schopp~~

Staff Members Present

- Quinn McAvoy
- Jess Davis
- Cyndi Williams

Preliminaries

Janelle Terkhorn – President – **6:01 pm**

Welcome

Approval of Minutes from the January Board Meeting

- Elizabeth motioned to approve the minutes, and Lisa seconded. Motion to approve the minutes passed unanimously.

Call for issues not on the agenda

- No issues were brought forward.

Executive Committee

Janelle Terkhorn, President

Committee Business

- Met on March 5, 2026, 11 am
- Next meeting: May 5, 2026, 11 am

Current Issues

- The Chemical Hygiene policy- Second reading
 - o There were no major edits to the policy.
 - o This is a required policy.
 - o Lisa motioned to approve the Chemical Hygiene Policy, Alex seconded the motion. The motion was approved unanimously.
- Drafted a letter to the community regarding changes to the voting and bylaws.
- Reviewed strategic plan documents and narrowed goals for Strategic Planning Committee.

- The Executive Committee still needs to begin the review process to the Employee Handbook regarding continuing education support. Some wording needs to be updated to be more inclusive of the various types of educational support we offer staff and to align with our current contracts.
- Work has begun on guidance documents for the Executive Committee internal workflow as well as legacy documents for transitions.

Operations

- Please see Quinn's operations report.

Current Projects

- Adding and updating policies in compliance with ISDH requirements and recommendations. [Strategic Project 2A]
- Guidance documents and workflow charts for EC and the President's role are being generated for review by EC. [Strategic Project 3B,3C]

Finance Committee

Committee Business

- Next meeting: April 20, 2026 @ 12.30pm ET (note rescheduled time)

Financial Review

- The school's financial position is approximately 20.79% higher than this time last year, with approximately \$1.452 million in cash and investments. Current assets are up approximately 19.27% from last year, and total liabilities are down about 2.72% from last year. Equity is up by 16.45%.
- As of March 8, 2026, the current investment balance is \$742,928. Since the account's inception, the school's investment funds have generated gains of 4.87%.

Current Projects

- The Finance Committee will address Scholarships in the coming academic year. [3]
- The Finance Committee will continue to monitor investment performance and propose adjustments to the investment strategy if needed. [1C]

Development Committee

Committee Business

- Help Needed: Silent Auction
 - Anything from a small item to a vacation.
- Spring Dine Out event at Hive was March 3, 2026.
- Please submit your board member pledges
- Next meeting: March 25, 2026, at 11 am on Zoom

Current Projects

- The annual campaign is underway, with the Giving Tuesday kickoff on December 2, 2025. To date, we have received 66 donations, totaling \$39,433.
- We are going to renew the BelieveKids fundraiser for fall based on strong performance
- We are going to discontinue Art to Remember based on poor performance and are planning to replace it with a plant sale
 - The committee is looking at partnering with Abel Nursery.
- Working on our new strategic plan for 2026-2028 that will likely include a capital campaign

Fundraising Update (caveat: numbers are reported as soon as the net is available or updated monthly; may not match fundraising accounting)

- 2025-2026 Annual Campaign: \$39,433. The number reported here reflects transactions recorded through FACTS Giving and donations made at BMS and may vary from financial reports due to deposit and data entry schedules.
- \$360 received in FACTS, on older campaigns or not attached to a campaign, since August.
- Sagamore Scholarship Fund: \$11,000 donated, \$10,175 net
- Believe Kids:\$5,153.50
- Donations from Reflect Martial Arts: \$1,462.50
- Merchandise: \$1,028
- 5K Trail Run/Family Fun Run: \$4024.79

- RaiseRight Scrip: \$176
- Kroger Rewards: \$909.25
- Scholastic Books: \$1186.94
- Art to Remember: \$347.05
- Box Tops For Education:\$30.60
- Chipotle Eat and Earn: \$358.11
- Hive Eat and Earn:
- Wonderfest Silent Auction:

Governance Committee

Governance Committee Business

- Board of Directors Annual Assessment: This survey will be sent in March. Please complete within two weeks of receiving. It will be sent to Board & Committee Members and will help us capture information and feedback on where we are as a board on governance and where we need to improve. The anonymous data and feedback will be shared with the full board before the end of the school year.

Nominating Committee Business

- Changes to voting and membership - communication going out to the community
- Five applications have been submitted by
 - Kellie Moss - parent of two Sweetgum students
 - Lori Stiglitz - grandparent of one Hickory student
 - Ricky Meade - parent of three children: Walnut and Hickory
 - Marna Wohlfeld - parent of two Walnut students
 - Jack Gallalee - parent of one Sweetgum student

- Proposed slate for 2026-2027 BMS Board of Directors:
 - Janelle Terkhorn, President
 - Anne Sterling, Vice President
 - Jack Gallalee, Secretary
 - Ricky Meade, Treasurer
 - Garrett Schopp, member-at-large
 - DeJohn Rose, member-at-large
 - Adrianna Fernandez; member-at-large
 - Marna Wohlfeld, member-at-large
 - Lori Stiglitz, member-at-large & external
 - Alex Burch, member-at-large
 - Kellie Moss, member-at-large
 - Lisa Ziemba, member-at-large
- The Nominating Committee will be disbanded following acceptance of the slate at the April Board meeting. Many thanks to Alex Burch, Sierra Lee, Will Kanyi, Jhondra Funk, and McKenzie Holmgren for their participation on the committee.
- New board members will start their first term. All current board members will be starting their second year of their first term and do not need to be voted on unless they change roles (officer positions or at-large).
- The Strategic Plan will be completed by the end of March. Lisa has met with all committee chairs but PAC.
- Next meeting: Thursday, April 23rd. 11:30 a.m.

Parent Action Committee

Adrianna Fernandez, PAC Co-Chair

Committee Business

- Next meeting:

Current Projects

- We are working to increase awareness and community involvement by increasing visibility of marketing materials. PAC is utilizing and maintaining the outside bulletin boards with current event promotional materials throughout this academic year to see if it makes any impact. This is in addition to our current communication methods (4A and 4B).
- The PAC organized spring service learning project will partner with Mother Hubbard's Cupboard. Our school will be participating in a three part service learning project that will include a snack drive, packing snack packs for kids, and a tour/on sight volunteer opportunity for a limited number of elementary families. Dates for this project will be:
 - February 17th to March 27th - snack drive
 - March 28th (Time TBD, will be in the afternoon) - on campus snack packing
 - Day/Time TBD - snack pack delivery and onsite volunteer opportunity at MHC
- Janelle asked who she should reach out to with ideas and connections for future service learning opportunities. She has a connection with New Hope for Families.
 - Adriana Fernandez said to send it to PAC.
- Art to Remember now allows schools to keep their website active through the remainder of the academic year. This means families can continue to upload artwork and place orders to be shipped to home past the initial December 31 deadline. The school will continue to earn a 25% profit on all purchases made now through the end of the school year. PAC will be organizing targeted promotion of this opportunity at the upcoming children's evenings and possibly at PAC events now through the end of the school year. More details on this will be discussed at our next meeting.
- Other Upcoming Spring Events -
 - Spring Service Learning Project supporting Mother's Hubbard Cupboard - February to March 2026, on campus day is March 28th
 - Food Truck Friday Meet Ups - April 17 and May 22, 5:00 pm to 7:00 pm
 - Teacher and Staff Appreciation - Monday, May 4 to Friday, May 8
 - Wonderfest at Wonderlab (Spring Fling) - Friday, May 8th, 6:00 pm to 8:00 pm
 - Popsicle Social - Wednesday, May 20, 3:15 pm to 4:15 pm

Opportunities and Needs

- Help spread the word about spring events. Volunteer opportunities are available for these events and are posted on the school's volunteer sign-up genius.

Operations Report

Report Created By: Quinn McAvoy, Jess Davis, and Cyndi Williams

Report Month: February 2026

Enrollment Update

- Enrollment tours continue.
- Student Enrollment: One Full-day student started this month. We have a waitlist for the all-day youngest group and the fourth-grade group.
- First- and fourth-grade classroom placement will be shared before spring break.
- Families are scheduling admissions visits, and we are hosting them daily.
- Summer Camp registration opened to non-BMS students on March 4, 2026.
- Enrollment for next year is on-track or better than previous years.

2025-2026 Enrollment

	Actual March Enrollment 2025-2026	Classroom Capacity 2025-2026	Budgeted Spots 2025-2026
Half Day	47	54	48
Half-Day Lunch Program	24	24	19
All Day	59	60	60
Lower EL	59	66	60
Upper EL	39	39	39

Staff

- Peer Evaluations are underway and due March 13, 2026.
- Quinn will be on medical leave 3/23-3/29 and will work from home 3/30-4/26. While

- Quinn is out, Jess will work in the front office.
- Recruitment for the new non-lead in Upper Elementary is ongoing.

Advocacy

- Quinn and Jess continue their work with the United Montessori Schools of Indiana.
 - Supporting a “walk to the capital” event in Washington DC at the annual conference in March, with opportunities to talk to state legislators about Montessori issues.
 - Jess will be meeting with Todd Young at the Capitol to discuss challenges for independent schools

Curriculum

- Curricular Review is math, and it will be extended through next year as a two-phase review
 - This year: Montessori curriculum analysis (identifying gaps, areas for greater depth), *Montessori for All* book discussion, Number Talk refresher, and Intro to Mathematical Mindset work
 - Next year: Mathematical Mindset deep dive, with a focus on intentionally designed cultures of mathematics

Student Services

- Ongoing ISP and accommodation plan review meetings with families/teams.
- The mid-year math screener has been administered.
 - Two variables were addressed: some children needed extra support in understanding how to conduct an assessment on an iPad (meaning the validity of their scores from the first round was questionable). We noticed some skills weren't being generalized to new formats as well as we'd like, so we built in additional formats and language to specifically target the cognitive skill of generalization.
 - While scores did improve from fall to mid-year, we are still working out the “kinks”, so I'm not sure how much is kids just getting used to being screened in math and what was impacted by the formats and language we built in—either way, it's a positive trend.

Professional Development

- All staff participated in a half-day workshop on math on February 16th - this included a peer-led book club discussion on “Math for All”, a critical analysis of the Montessori math curriculum as well as a 2-hour workshop led by Jess on Mathematical Mindset with a focus on facilitating inquiry and engaging students' conceptual understanding (in addition to procedural understanding) of math. Some of this was lecture-style, and some was hands-on, small-group mathematical inquiry participation.
- Mathematical Mindset work will continue throughout the semester, with level-based workshops in March and April and another whole-staff workshop at the end of the school year.
- Jess is collecting data on this PD process and will be using it for an instructional coaching efficacy research as her thesis project for her TLC master's.
- Jess is finishing a master's degree in Teaching, Learning, and Curriculum this May and

- has been accepted into a PhD program in Learning Sciences.
- Nick continues a master's degree in Teaching, Learning, and Curriculum.
- Jess is continuing work with Stanford's mathematical mindset institute:
 - Completed a Number Sense Intervention workshop 3/3-3/4 (online)
 - Will complete a mathematical mindset inquiry program training in April (online)
- Alice and Jess are going to the AMS national conference during spring break.

Administrative

- Classrooms have completed their ABAR equity audits as a summative assessment of this three-year project. The summary was created and shared with the committee, and will go to the board after committee review.
- Montessori Moment (website blog) postings
- National School Lunch Program (NSLP): On-site Administrative Review completed on February 13th. Quinn, Cyndi, and Emily are now updating procedures and incorporating recommendations.
- NSLP: January lunch and snack claims filed
- Monthly monitoring of student Bark accounts (online security/safety).
- Some annual campaign mailings/donations have been coming back to us. We currently sit at \$39,483 raised toward the 2025-2026 annual campaign through FACTS, plus an additional \$11,000 raised through Sagamore.
 - Last year's total was \$31,759

Community Partnerships

- Bloomington Montessori is teaming with Bloomington Community Orchard to host a pollination-themed educational activity table at the Lotus Bazaar at Fairview 4/3-4. Open to all area fourth graders on Friday, and open to the public (targeted toward families with children) on Saturday.
 - Jess will be working with Upper Elementary students on some displays for the booth
 - We are looking for some volunteers to help man the booth both days.
- After-school clubs to be offered this spring: Taekwondo, Girl Scouts, Newspaper Club, Rubik's Cube Club, and Chess Club.
- Mother Hubbard's Cupboard (5K, Upper El service project, food drives, and PAC family project)
- Bloomington Community Orchard-Upper el site checks and tool maintenance (sanding and mineral oiling wooden handles of community orchard tools).
- Our Upper Elementary classroom is continuing its partnership with IU's Maurer School of Law and the Outreach for Legal Literacy Program. This semester's lessons will culminate with a field trip to IU, where the students will participate in a mock trial.

Facilities Completed

- Monthly pest control mitigation in the main building
- Front door repair

Pending

- Magnolia ceiling repair-waiting for consistent dry warm weather.

- Sweetgum and Magnolia - Investigate the cause of the flooding. I suspect the issue is with the soffits. Pending snow and ice melting.

Communications

- Bi-weekly newsletters, Facebook posts, and flyers
- Montessori Moment blog (3 new posts) on the BMS website

Finances as of 2/28/2026

- Main checking: \$292,723.42
- Money market: \$241,704.43
- Café Account \$12,742.02
- Fundraising Accounts: Savings \$2,442.53, Checking \$25,160.74, Paypal \$255.50, Sagamore \$10,175
- CD \$ (ECR money matures 6/16/26): \$115,223.18

Investment Accounts 2/28/2026:

- Fundraising: Started at: \$65,000, Currently at: \$83,748.93
 - Cash Management: Started at: \$100,000, Currently at: \$105,855.71
 - Long-Term Fund: Started at: \$483,978.00, Currently at: \$572,093.82
 - IUCU Loan balance: 4%: \$395,293.67
- Delinquencies: 2024-2025 - \$364.20 (two families), 2025-2026 - \$6,402.25 (six families)

Strategic Plan Accountability

Project Updates

Operations-Organizational

■ Project: Increase Student Diversity-

-socio-economic diversity: continuation of the scholarship program with the short-term goal of funding the scholarships we have and the long-term goal of increasing the number of scholarships; addition of Sagamore Scholarships for Education Choice

-racial diversity

○ Project: Consistent Social Media presence-great parent resource helping with vision-level guidance, SEO/analytics, and content!

A knowledgeable parent says this should not be a goal—that a better use of our time is to target a smaller output with tools like Google Analytics. However, they were unable to fulfill their ideas to support us this year. We may look for another knowledgeable parent to pick this up, or follow up with this parent next year.

○ Project: Hire Counselor/Therapist

Closing

Janelle Terkhorn – President

- Janelle thanked everyone for attending.
- Meeting Adjourned: **6:42 pm**

Respectfully submitted by Alex Burch, member.