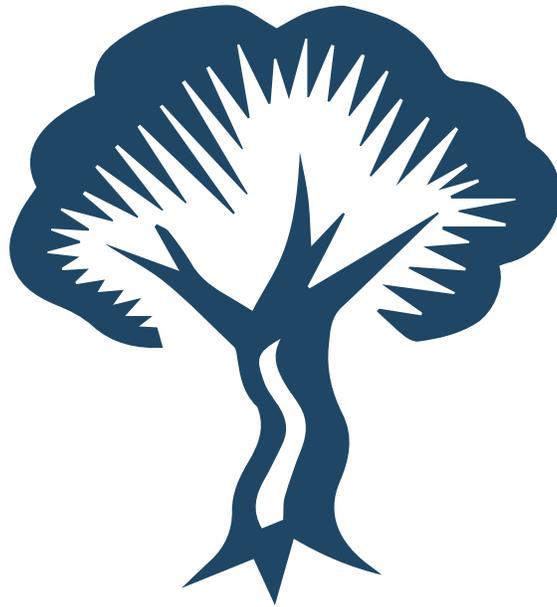


SANTA CRUZ MONTESSORI

Educating for Peace



Annual Report 2018-2019

At Santa Cruz Montessori, we value:

Respect

Respect for our children and families, our staff, our volunteers, our school's prepared environment, for diversity, for the natural world and larger community, for Santa Cruz Montessori as a living institution.

Growth

Growth of all our students, academically, physically, emotionally and socially to reach their full promise, of parents in their understanding of Montessori principles, and of our staff members as they continue their development.

Integrity

Integrity in our code of ethics and communication, our educational, administrative and policy decisions, in how we compensate our staff, in how we set our tuition and fees and conduct our fundraising, in how we manage our finances.

Openness

Openness in how we craft school policy, in accepting suggestions from our school community, in communication.

Responsibility

Responsibility for funding our programs and maintaining our school community, recruiting, training and retaining staff, for creating opportunities for parent participation, for using natural resources wisely, for meeting our school's mission, and for responding constructively to the larger community and world.

Commitment

Commitment to Montessori principles and assisting families in understanding and implementing these principles, to increase awareness and application of Montessori principles, to encourage joyful, lifelong learning, and to create a more just and peaceful world through the education of the children in our care.

Our Mission

As a Montessori learning community, we inspire life-long learning and a peaceful world by nurturing the natural development of the whole child.



From the Head of School

Dear Santa Cruz Montessori Community,

Santa Cruz Montessori has inspired students for the last 55 years to become self-motivated, caring individuals. I have been a witness to our school's nurturing environment for the last 20 years and am grateful for the Montessori values we uphold. Our students make a positive contribution to society, and are ambassadors for life long learning. Please take the time to read our alumni spotlight, featuring Josselyn Verutti. Josselyn is a great representative of the values we aim to instill in our students.

As I reflect on our 2018-19 school year, I am extremely grateful for the continued excellence that Santa Cruz Montessori upholds. There is genuine care put forth by everyone involved in the planning of our children's educational journey. The investment by our parents, staff and volunteers makes a profound difference in our environment. It is a joy to be part of this dedicated community.

In this report you will find the names of those that have made a personal investment on behalf of our children. I would like to thank you all for your immense dedication and generosity; we would not be this vibrant community without your support. I personally treasure each and every family at our school, and look forward to watching the students learn, grow and become people who care about themselves, and others. Each of them leaves a lasting impact on our community, and they head into the world ready to embrace new challenges.

Gratefully,



Kim Saxton

Head of School



The child is both the hope and promise for mankind.

- Maria Montessori -

From the Board President

Dear Santa Cruz Montessori Community,

A sense of community. This is a feeling that we have of belonging, a feeling that we matter to one another and to the wider group, and a shared faith that our needs will be met through our commitment to be together. People often ask why I volunteer my time to be a member of the board of directors at Santa Cruz Montessori, even though my children graduated back in 2006 and 2008. My answer always comes back to the sense of community and wanting to support an organization that was fundamental in building the foundations of my children's education and success. As they worked their way through high school, college, post-graduate studies and started in their professional careers it has been quite clear the impact that their early education from YCC through Wavecrest has had on them. This was all made possible by the dedication of the staff, board members, volunteers and donors in our community over the 55 years since our school was founded back in 1964. While our amazing staff focused on providing the highest quality Montessori-based education and inspiring a love of life-long learning, the board has focused on the long term vision of our school as we have grown through the decades. Families at the school have helped model for our children what it means to be part of a community by giving generously of their time and finances. I am proud to continue to be part of such an amazing organization and pleased that you are part of it. The board of directors at Santa Cruz Montessori thank you for your work and gifts that help support our mission and guide the children in our care.



Chris Ohlsen

Board President, Alumni Parent



Board of Directors

(At end of 2018-19 school year)

Chris Ohlsen - *President*

Kate Tripp - *Vice President*

Nikki LeGassick - *Treasurer*

Deauna Mansfield - *Secretary*

Kim Saxton - *Head of School*

Jennifer Caddes

Trey Garlough

John Haskins

Christine McBroom

John McGuffin

Sara Moss

Sarah Nofi

Kristin Tosello



Spotlight On Our Programs

Young Children's Community

Ages 18 months to three years

Our Young Children's Community has been created specifically for our youngest children to foster the incredible intellectual, emotional, social and physical growth occurring during this developmental phase. The community becomes a second home to our toddlers with activities that address their quest for independence within a safe and secure environment. Under the care of their guides, children experience respect, friendship and love.

"The Young Children's Community is an incredibly special program for the foundation of a young person's educational experience. At as young as eighteen months our toddlers are encouraged to explore their many cognitive possibilities, given developmentally appropriate experiences to encourage their independence, and loved for their spirit and contributions to the community. The start of each morning is particularly special and our favorite part of the day. Every child is greeted at eye level with love and a warm smile. Attention is paid to this important separation as it sets the tone for the rest of the child's day as well as the parents. It is our goal to make each child feel loved, supported and welcome. In doing so we hope to cultivate love, peace and compassion in the hearts of our young friends so that they in turn will take this into the world."

Morgan Spivey, Fireside Class Guide



Primary

Ages three to six years

Maria Montessori recognized the spontaneous interest that arises within the three to six year-old child. It is through the child's interest and active engagement that the love of learning arises. The guides observe and record each child's progress, knowing when to allow a child to engage with genuine interest on self-chosen activities, and when to introduce a new challenge or point of interest. Young children respond to the respect, beauty and order of their environments with joyful learning, respectful friendships and a sense of their own accomplishment.

"I just love being a Montessori teacher. The period of growth of the whole child from age 3-6 is remarkable. As the guide I have the space and opportunity to analyze and prepare each and every piece of material that is placed in the classroom, asking if it serves a purpose for the children in their particular phase of development and having the freedom to adapt to the needs of the individual and group.

I love observing and seeing the children gradually reveal more of themselves through the work they choose or don't choose; to use this information to time lessons, and to see the sense of joy and calm they experience through their accomplishments. I love that they have the space to practice, concentrate, make mistakes, and be themselves. I love that guiding their social and emotional learning is a natural part of our day. Not to mention, it is fun to read books using silly voices, sing, dance, laugh, and see through their eyes, our incredible world."

Amy Nishikata, Willow Class Guide



Elementary

Lower Elementary - Ages six to nine years

Upper Elementary - Ages nine to twelve years

Our elementary environments provide a place for children to continue to develop their reasoning, imagining minds. Our guides inspire elementary students as they contemplate all aspects of the world around them, the universe, and their responsibilities as part of a society. The Montessori materials bring the children into contact with the concrete means of exploring and mastering a rich curriculum. Students study the interdependence of life, the development of civilization, language and culture, and their roles as contributors to and stewards of life on Earth.



"My favorite part of being a Montessori educator is watching children pursue their curiosities. The freedom provided by the elementary environment encourages their love of learning and is also rich with opportunities for them to develop a variety of skills."

Molly DiPiero, Sequoia Class Guide

"One of the greatest joys of working in elementary is getting to know each child as an individual. With this knowledge of their particular interests and strengths, we can truly inspire great work. I am always amazed at the creative ways that they show their learning and collaborate together."

Kristin Tosello, Junior Class Guide



Junior High

Ages 12 to 15 years

Wavecrest Junior High Program is designed to foster self-discipline, confidence and a supportive peer community. The staff guide the students in the classroom and in the community. Students are encouraged to be active participants in their educational process while they build a personal vision of themselves working in society. Wavecrest offers a challenging academic experience within a developmentally based approach to educating the student.



"Our weekly Thursday at Live Earth Farm is a central element of the junior high curriculum that is relevant to the development of the adolescent. Students are engaged in real work that serves the community. Through this real work, the students find value with their service. It is a journey that brings alive their need to contribute to their environment and group. They realize that their contributions benefit themselves, the group, and society at large. At the farm, the students connect with the work and this empowers them to feel valued and appreciated for their contributions."

Tom Lepoutre-Postlewaite, Wavecrest Director



Featured Alumni

Josselyn Verutti

Along with growing up at Santa Cruz Montessori, the ocean plays an important role in the lives of many of our students. Santa Cruz Montessori 2013 graduate Josselyn Verutti is no exception and describes below the importance of her education – both at SCM and on the water.

I started my education as a three-year-old in the Redwood Primary classroom, then moved on to Sequoia, Cypress, and finally Wavecrest. Following my graduation from Wavecrest in 2013, I attended Kirby School graduating in 2017. I now attend Cal Poly San Luis Obispo and absolutely love it. I am on track to graduate in spring 2021 with a Bachelor's of Science in Construction Management with a Minor in Architectural Engineering.

Here at Cal Poly, I am fortunate to spend my time not only studying but also continuing my passion for sailing. I grew up sailing with my dad on our 24-foot Moore 24 sailboat, later learning to sail and race a variety of different dinghies. I was one of the captains of my high school sailing team and now compete at the collegiate level against universities from across the nation. In the spring of 2018, my team and I attended the Pacific Coast Conference Championships in Hawaii, where we qualified Cal Poly for the College Sailing Nationals for the first time in history. I was named a member of the All-Conference Women's Team and was fortunate enough to be one of five team members to fly to Virginia and represent my team at Nationals.

My passion for sailing was strongly apparent even back when I was a student at SCM, especially throughout my years in Cypress and Wavecrest. I took every opportunity I could get to bring sailing into my education: I would write reports and memoirs about sailing, use my knowledge of the ocean in my science classes, attempt to make every art project sailing related, and I even recall persuading Terry in Wavecrest to let me make a model of a sailboat for part of a math project. I don't believe I would've had the flexibility to do this at another school. My teachers at Montessori supported my passion and allowed me to turn elements of my education towards something that would truly get me excited about learning.



Even now that I am in college, I am regularly reminded of how fortunate I am to have a Montessori education. The philosophy allowed me to learn at my own pace; pushing me to practice self-advocacy, even if I didn't fully understand what it was at the time. Because of this, I was taught at a young age the value of approaching my teachers with questions, which is something that has only become more important as I've progressed in my education. Whether it was asking for help with a subject, or to ask for a challenge once I had mastered a lesson, I became comfortable early on with recognizing my strengths and weaknesses and knowing when to ask for help. One of my fondest memories was expanding on my knowledge of math with John McGuffin in Cypress. After I and some of my peers continued to ask him for more and more challenging square root problems, I recall John sitting down with us at the square root peg-board to show us how we could take the lesson even further.

The opportunity to learn in small classes with other grade levels is something that truly sets SCM apart. Not only did I make great friends, but I was also able to collaborate with students both older and younger than me, helping break down the barriers that normally stand between grade levels. I was surrounded by an incredible group of peers, some of whom I stuck with all through high school. We are still close to this day, and a few I even see between classes here at Cal Poly.

I am extremely fortunate to have a Santa Cruz Montessori education, and am so glad that I was able to stay at SCM all the way through junior high. Coming from a community which fosters confidence in students and challenges them to do their absolute best, I was more than prepared as I made the transition to high school. Now seven years after leaving SCM, I am still so grateful for all that I learned there and am proud to say that all I do in the future can be traced back to my time as a Santa Cruz Montessori student.



Supporting Santa Cruz Montessori

Each year, Santa Cruz Montessori depends on fundraising campaigns to fully fund our programs. Like most independent schools, SCM charges less in tuition than actual costs. The school's tuition covers about 92% of expenses. The balance is made up each year through generous donations to our fundraising campaigns.

We are so grateful and proud of our community of parents, staff, directors, alumni, grandparents, friends and community supporters who give so generously each year to support our school. Your commitment to Santa Cruz Montessori is an inspiration. We thank you!

Annual Drive

Our Annual Drive meets a wide variety of needs at SCM. It provides funds for classroom materials, science and outdoor education equipment, staff development, special programs, field trips, parent development programs, and much more.

Tuition Assistance

Tuition Assistance strengthens SCM for everyone. It allows us to keep our programs at full enrollment and balanced by age and gender. It improves our economic diversity so that the school can better reflect our community. Tuition Assistance also helps to retain our SCM families, which stabilizes our learning environments and keeps friends together.

Arts and Classroom Enrichment

Our Arts Drive is dedicated to funding our visual arts, music, theater, ceramics, and Spanish language programs. SCM is committed to providing vibrant instruction in the arts and foreign language. While other schools have cut their fine arts budgets, SCM continues to make arts education a priority. Arts instruction is associated with student gains in math, reading, and critical thinking skills. The arts also encourage new ideas and ways of seeing the world.

Capital Campaigns

Every 5-7 years, SCM undertakes a capital campaign for a specific project to fulfill the Board's Strategic Plan. Our most recent capital campaign, the Going Solar Campaign, placed solar panels on three of our campus buildings. We are reducing our carbon footprint, saving money on utility bills, and modeling environmental stewardship to our students.

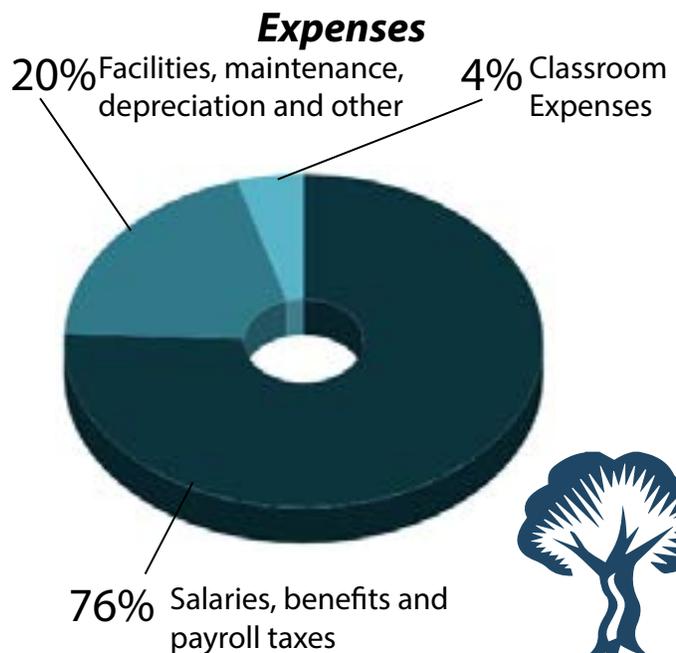
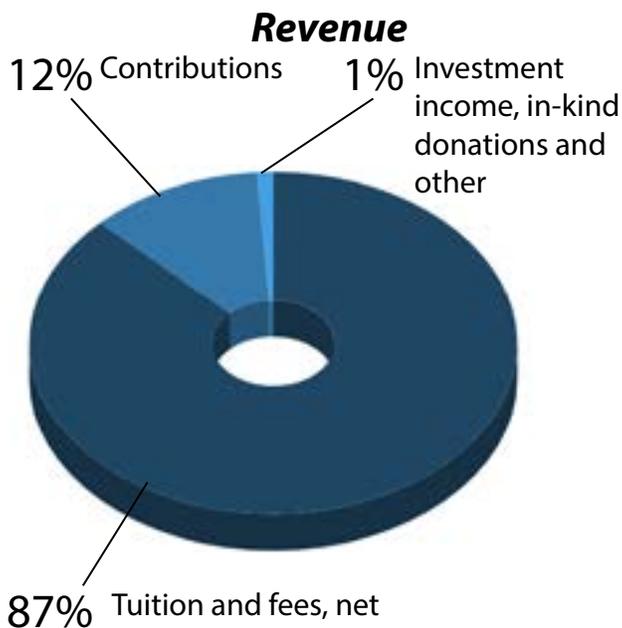
Essential to the growth of the Santa Cruz Montessori campuses, past capital campaigns have made it possible to build our main office and community room building, and the Winston campus which houses our Young Children's Community and Junior High (Wavecrest Adolescent Community) programs, as well as the addition of the Willowbrook campus extension.

We Are So Grateful For Your Support.

Financial Report

Statement of Financial Position Information		June 30, 2019	June 30, 2018
Assets			
Total current assets		\$ 1,555,818	\$ 1,101,007
Property and equipment, net		6,438,190	6,615,529
Endowment principal and cash restricted for debt service		475,543	475,543
Total assets		\$ 8,469,551	\$ 8,192,079
Liabilities			
Total current liabilities		\$ 412,555	\$ 361,995
Total long-term liabilities		4,621,772	4,760,773
Total liabilities		5,034,327	5,122,768
Net Assets			
Without donor restrictions		2,847,020	2,685,702
With donor restrictions		588,204	383,609
Total liabilities & net assets		\$ 8,469,551	\$ 8,192,079
Statement of Activities Information		FY 2019	FY 2018
Revenue			
Gross tuition & fees		\$ 6,117,935	\$ 5,928,607
Less: financial aid discount on tuition & fees		(1,867,671)	(1,782,427)
Net tuition & fees		4,250,264	4,146,180
Contributions		559,614	388,494
Investment income, in-kind donations and other		51,951	70,116
Total revenue		\$ 4,861,829	\$ 4,604,790
Expenses			
Academic program		\$ 3,418,782	\$ 3,406,560
Management and administration		905,006	900,678
Fundraising		172,129	165,118
Total expenses		\$ 4,495,917	\$ 4,472,356
Change in net assets		\$ 365,912	\$ 132,434

Fiscal Year Ended June 30, 2019



2018-19 Annual Drive Donors

Abitbol Durham Family
Stan & Lynne Abraham
Absolute Auto Glass
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Andrea Herrick Family
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The Apple Lane Foundation
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Google Matching Gifts Program
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Luke Wallis Family
Mansfield Family
Mather Family
McBroom Family
McDonnell Harraher Family
McGraw Family
McGuffin Family
Luis Medina Family
Mende Family
Scott Menter
Patricia Merikallio
Jason & Elizabeth Miller Family
Robert & Yolanda Miller Family
Montgomery Family
Annie Morris
Sara Moss Family
Dan & Catherine Murphy Family
Murray Family
Nicolier Family
Nishikata Family
Sarah Nofi
Noll Family
Nisan O'Connor
Christopher & Molly Ohlsen
Julie Packard
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Painchaud Benson Family
Pantos Family
Patterson Family

Patterson Bonura Family
Peixoto Family
Peruzzi Family
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& Dan Likeness
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Jenny Taskey
Thomas Family
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Varni Family
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Ware Heron Family
Kathleen and Robert Warfield
Leslie Warren
Patricia Washko
Wentworth Family
Williams Upshur Family
Constance Wingate
Sandra Wisher
Jean Marie Wood



Arts and Classroom Enrichment Donors 2018-19

Abitbol Durham Family	Ekers Construction	Lowery Family	Scalo Family
Aiono Family	Ekers Family	Mansfield Family	Schwab Charitable Fund
Sybil Albrecht Lewis & Art Lewis	Erasmus Family	Mather Family	Matthew & Kirsti Scott
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Juana Alfaro	Edith P. Frick	McBroom Family	Seacliff Construction & Design
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Anonymous	Amy Geller Family	McKelvey Family	Seikel Miles Family
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Brenda Brady Atwell	Google Matching Gifts Program	Mende Family	Sita Shapiro Family
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DeBonis Family	Lazenby Pavao Family	Bela Ravikumar	Wentworth Family
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Draper University	Levig Penrose Family	Saxton Family	
Terry & Cathleen Eckhardt	Michael Lew		
Eilfort Luoma Family	Lorey Family		

Tuition Assistance Donors 2018-19

Sybil Albrecht Lewis & Art Lewis	Robert Fraser	Kinsey Foundation	Rivera Chacon Family
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Andrea Herrick Family	Frick Heady Family	Kling Vickers Family	Jasmine Roohani Family
Anonymous	Chane Fullmer	Lansing Family	Roush Barton Family
Colleen Ayotte Family	Garlough Morken Family	Lassiter Family	Santana Family
Beck Ivancko Family	Amy Geller Family	LeGassick Family	Saxton Family
Bern Lesniewski Family	Gerald-Yamasaki Family	Tom & Maryse	Tisha Scurich
Blick Family	Madison Gillen	Lepoutre-Postlewaite	Seacliff Construction & Design
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Anne Bonner	Goebel Wheaton Family	Michael Lew	Reid Seidler Family
Tom Bonura & Lindsey Roscoe	Golbin Granier Family	Los Altos Community Foundation	Seikel Miles Family
Luciano Bridi	Google Matching Gifts Program	Mansfield Family	Jonathan & Ashley Smith Family
Bridi Milligan Family	Greenson Family	Mather Family	Lennox & Yvonne Smith Family
Broz Family	Eduard & Marie Gregor	McBroom Family	Solspace
Caddes Family	Patty Lowney Gregory	McGuffin Family	Carol Spivey
Campbell McDade Family	Gunter Ross Family	Luis Medina Family	Anne Stephanson Family
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Chavez Family	Barbara & John Harker	Jason & Elizabeth Miller Family	Strock Real Estate
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Christopher Hertzberg Family	Hendrix Family	Sara Moss Family	Woutje Swets
Cisco Systems Matching Gifts Program	Robert & Claire Heron	Dan & Catherine Murphy	Jenny Taskey
Chip Conley	Hougardy Steinhardt Family	Don Nathe	Thranow Family
Conley Merikallio Family	Helen Intintoli	Mia Nayfach	Timucin Family
Yvette Contois	Cristina Intintoli	Sarah Nofi	Varni Family
Robert & Patricia Craig	Jacquard Family	Noll Family	Vozmitsel Akers Family
Stacy Craig	Jeffries McGoff Family	Ohlsen Family	Waluk Benoit-Bird Family
Della Davis	Jones Yuen Family	Painchaud Benson Family	Kathleen & Robert Warfield
Diener Family	Lloyd & Lesley Kahn	Pantos Family	Leslie Warren
Patricia Diener	Kaloyanov Necheva Family	Steve Penrose	Williams Upshur Family
Dixon Family	Kantek Family	Peruzzi Family	Jean Marie Wood
Eilfort Luoma Family	Kayser Larson Family	Angelina Petersen	
Ekers Family	Kim Family	Elizabeth Posner Family	
Everything Writing	Kimbrough Radan Family	Prestwich Family	
	The Norman & Joan	Bela Ravikumar	
		Kathy & Leif Rideout	



Santa Cruz Montessori Wavecrest Class of 2019



Zander Aguirre



Brady Garlough



Owen Noll



Jack Thranow



Wesli Caddes



Estela Kantek



Audrey Ramos-McCoy



Ryan Tosello



Sequoia Christensen



Seija Mauldin-Nores



Meredith Robbins



Amelia Tripp



Jackson Douvia



Parker Nacamuli



Sydnee Stephanson

The Child who has felt a strong love for his surroundings and for all creatures, who has discovered joy and enthusiasm in work, gives us reason to hope that humanity can develop in a new direction.

- Maria Montessori -



In loving memory and with gratitude

Jean Marie Wood

September 11, 1926 - January 24, 2019

Jean Wood was a true friend to Santa Cruz Montessori. Though she lived in Santa Cruz for over 40 years, this true blue Yankee never lost her Boston accent.

Jean was born on September 11, 1926 in Quincy, Massachusetts, and grew up with her parents and sister, Natalie. She had a heart attack at the age of eight and had to stay in bed for 3 months, which deepened her love of reading. She resolved to spend her life helping children. After college and a few years as a physical therapist, Jean returned to school to get her teaching credential. She taught 4th and 5th grade and helped develop her school's reading curriculum.

Jean was introduced to Santa Cruz Montessori by a school parent in 2014. She visited our school and was enchanted by what she saw. Jean became a strong supporter of SCM, making yearly donations to the Annual Drive, Tuition Assistance Drive, and the Arts. When her health made it difficult to visit campus, we visited Jean monthly and brought her art and letters from the children. She was always delighted by the children's work.

Jean passed away on January 24, 2019 at Dominican Hospital. Upon her passing we were informed that Jean had included Santa Cruz Montessori in her will, with generous donations to both our Arts and Tuition Assistance programs.

We miss our monthly dates with Jean, but are grateful to see reminders of her friendship and generosity all around the school on a daily basis.



If you or your family members are interested in setting up a bequest gift to SCM from your estate, we would be pleased to help with that process. Contact the SCM Development Department for more information.

Thank you for all of your support

With your help, this year we raised:

- Over \$108,000 donated for Annual Drive
- Over \$160,000 donated for Arts and Classroom Enrichment
- Over \$75,000 donated for Tuition Assistance
- \$200,000 donated for Tuition Assistance and Arts and Classroom Enrichment from planned giving

In addition:

- Tuition Assistance Endowment Fund ended the year at over \$248,000
- Operating Reserve Fund ended the year at over \$216,000



Thank you to all of the volunteers and committees that support our school!

Development Committee

Community Support & Social Events Committee

Finance Committee

Tuition Assistance Committee

Yearbook Committee

Diversity Committee

Classroom Ambassadors

All of our supportive families, staff, and community volunteers

Thank you to all of our 2018-2019 Classroom Ambassadors

Ashley Lowery - Mulberry

Rory McBroom - Fireside

Heidi Nyburg - Redwood

Aine Kahn - Willow

Ashley Smith - Ohlone

Ann Lorey - Monarch

Misty Greenson - Adobe

Deauna Mansfield - Evergreen

Sita Shapiro - Sequoia

Amy Geller - Cypress

Linda Timucin - Junior

Robin Nacamuli - Wavecrest

We are so grateful to the many generous donors who supported Santa Cruz Montessori during the fiscal year of July 1, 2018 through June 30, 2019. Every effort has been made to ensure the accuracy of the information and listings in this report. Please accept our sincere apologies for any errors or omissions. Please bring oversights to the attention of the SCM Development Office.

Photos by Danieka Erasmus and SCM Staff



Ways To Give

Give In Person

Drop off your tax-deductible donation at the main office or the Development office.

Donate By Mail

Mail your donation to Santa Cruz Montessori, 6230 Soquel Drive Aptos, CA 95003

Give Online

Make a credit card donation at scms.ejoinme.org/donations. Gifts may be made all at once, or may be scheduled for recurring payments.

Make a Pledge

Contact the Development office or use the online pledge form at scms.org/pledge to make a pledge. Payments can be made any time during our fiscal year, July 1- June 30.

Gifts of Securities

Gifts of stocks and other appreciated assets may result in additional tax advantages to the donor. A number of our larger Annual Drive and Capital Campaign gifts come in this form. Contact the Development office if you wish to learn more.

Endowment

Gifts to endowment are a way to invest in the future of Santa Cruz Montessori. The principal of these gifts remains intact, and can grow over time, while a portion of the earnings on the endowment can be used to support school programs and needs. SCM currently has a Tuition Assistance Endowment Fund. Endowment gifts can be given to the Tuition Assistance Endowment Fund, or you may contact the Development office if you have an interest in establishing a new endowment fund.

Gifts-in-Kind

Items or professional services that are necessary to the operation and advancement of the school are considered gifts-in-kind. Past gifts include auction items, computer software, and services such as architectural planning. Gifts-in-kind are appreciated throughout the year.

Matching Employer Gifts

Check with your employer to see if they have a matching gift program for charitable donations.

Planned Giving

Bequests are the simplest of planned gifts. By naming Santa Cruz Montessori in your will, you can make a gift which ensures the future of our school. Bequests can be placed into endowment so that their impact is a legacy to the future. Please notify the Development office if you want to include Santa Cruz Montessori in your will.



For more information, contact the Development office.

dev@scms.org - (831)465-7683 - Tax ID# 94-1573507