



SANTA CRUZ MONTESSORI

ESTABLISHED 1964



2024–2025 Annual Report

State of the School

Dear Santa Cruz Montessori Community,

This year, our school community had the privilege of celebrating a truly remarkable milestone, our 60th Anniversary. As we reflect on six decades of learning, leadership, and lasting relationships, we honor the visionaries who laid our foundation, the educators and staff who continue to uphold our mission, and the students and families who bring life and purpose to our work each day. This annual report captures not only the achievements of the past year but also the spirit of resilience, innovation, and collaboration that has carried us through sixty years and continues to guide us toward an inspiring future.

This year has been one of our favorites, perhaps because of the immense joy this community brings and the ways we have grown together. Reaching such a special milestone naturally invites reflection. We often think about our children: not only are they our hope for a brighter future, but they are truly the foundation upon which our society stands. Their innocence, curiosity, and boundless potential shape the world in ways we can only imagine. They represent our hardest work and our greatest investment.

This year, our vibrant arts program, drama, music, and ceramics, continued to flourish under the guidance of our dedicated educators. With great joy, we began developing our outdoor environment and completed the redesign of the Willow/Redwood play area. Even more exciting plans are underway for a beautiful and expanded outdoor environment, a vision made possible through the thoughtful work of our strategic plan. The dedication, listening groups, surveys, and countless hours contributed by our community have brought these plans to life. Together, we see a clear and inspiring path ahead.

Whether you joined us for Jesse McCarthy's discussion on the importance of Montessori education in today's world, watched classroom plays, participated in the arts auction, cheered on our students at the Kaiser Arena games, or enjoyed a fun spaghetti dinner while celebrating our children's talents, we hope you felt the connection and inspiration that define Santa Cruz Montessori. Most of all, we hope these moments illuminated the "why" behind a Montessori education, an approach that nurtures the whole child and supports their growth, development, and bright future.

We thank you for your dedication to Santa Cruz Montessori and for being part of this remarkable journey. We are honored to walk alongside you into our next decade of learning, community, and possibility.



Kim Saxton Head of School



Christine R. McBroom Board President

OUR MISSION

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

OUR PHILOSOPHY

Santa Cruz Montessori is founded on the methods and philosophy developed by Dr. Maria Montessori. She recognized the potential of each child to become a force for good in creating a better world for all.

OUR VALUES

DEVELOPMENT OF THE WHOLE PERSON

We support the development of the whole child and foster an environment of respect and compassion for self, others, and our environment.

FREEDOM WITH RESPONSIBILITY

We guide children to independence in their learning, encouraging them to identify their interests, passions, and strengths, fostering a lifelong love of learning and discovery.

DIVERSITY & BELONGING

The SCM community creates a culture of belonging where the richness and complexity of each individual is honored. We recognize the interdependence of all beings and systems of our world.

COMMUNITY

All members of the Santa Cruz Montessori community are committed to working together to create a quality Montessori environment. We embrace collaboration in order to achieve our mission-driven goals.



Thank You To Our Staff!

| | | | | |
|-----------------------|--------------------|-----------------|----------------------|-------------------|
| Adrienne Stateler | Danit Christensen | Karina Chavez | Martina Erusnay | Regina Radan |
| Alaya Davila | Dave Bunton | Sixtos | McKenzie Martinez | Sequoia |
| Amanda Crawford | Emily Lansdale | Kathy Warfield | Melissa McGuffin | Christensen |
| Angela Bridi-Milligan | Flor Chavez | Kim Miles | Michael Ann Jacobson | Sophie Davenport |
| Angela Henrickson | Gaby Ibarra | Kim Saxton | Mikayla Kraatz | Stacy Craig |
| Barbara Harker | Hannah Stublefield | Kristen Davison | Molly DiPiero | Sydney Mongiello |
| Chris Nestlerode | Jenny Taskey | Kristin Tosello | Morgan Spivey | Taylor Holter |
| Clara Thranow | Jessica Cannarozzi | Laura Peduto | Nina Noorzad | Vic Thranow |
| Cristina Intintoli | Jill Matthies | Lizzy Miller | Olivia Locatelli | Victoria Frichner |
| Dalila Leon | John McGuffin | Madison Gillen | Patty Stone | Wesli Caddes |
| Danieka Erasmus | Juana Alfaro | Maggie Cone | Pearl Vickers | |
| | Julie Parraguirre | Mariah Lambert | | |

We are proud of our highly qualified staff. As part of our commitment to a Montessori education we require all head guides to be AMI trained, and additionally 7 of our assistant guides are trained.

This past summer we celebrated five of our teachers completing their full AMI training!

Thanks to support from the Annual Drive, our staff were also able to participate in the following professional development opportunities:

- Primary, Elementary, and Adolescent Montessori Trainings
- First Aid and CPR Training
- Whole School Leadership Training
- Understanding Emotional Triangles
- CA State Childcare Licensing Training
- Toileting Training
- Jesse McCarthy Handling Strong Emotions
- Geometry Math Training

Our staff are the most valuable part of our community—we are proud to correlate our head teachers to the local public school salary scale. This allows us to not only retain our teachers at the elementary and Junior High levels, but also puts us far above the local and state average for our Young Children and Primary Communities.

Additionally, we have increased our budget to cover the increasing health insurance so our staff are not having to take on that additional burden that continues to go up about 10% every year. Given the high cost of living in Santa Cruz County, this is important to us to retain and recruit our amazing faculty.



22 AMI Trained Faculty Members

13 staff have been here for over 15 years!

Bachelors Degree in an Education Field: 15
Advanced Degree (Masters or PhD): 19

SCM Strategic Plan

SCM launched a strategic design process in the fall of 2023, guided by the partners at Triangle Associates, a strategy consultancy to private, independent schools.

1. *Research: online survey of stakeholders; listening sessions in-person; analysis of local demographic data; and analysis of school operating data*
2. *Identification of Strategic Themes*
3. *Ideation Workshop to Design Strategies*
4. *Drafting the Strategic Framework*
5. *Board Review and Adoption*
6. *Rollout to the Community*
7. *Implementation Planning*

Our staff and team have begun planning out the different steps to bring our goals to the future.

Strategic Plan Goals

Local Community

Goal: Broaden and deepen awareness of SCM as an educational option and resource within our local community.

Plant

Goal: A beautiful and consistent outdoor environment on both campuses that embodies Montessori principles and supports whole child development.

Resources

Goal: Ensure that SCM has the resources it needs to flourish as a business.

SCM Community

Goal: Retain a diverse community of staff and families committed to the mission of SCM.

Program

Goal: Communicate the value of our Montessori program and the unique ways in which it prepares students for success in high school and beyond.

Outdoor Environment

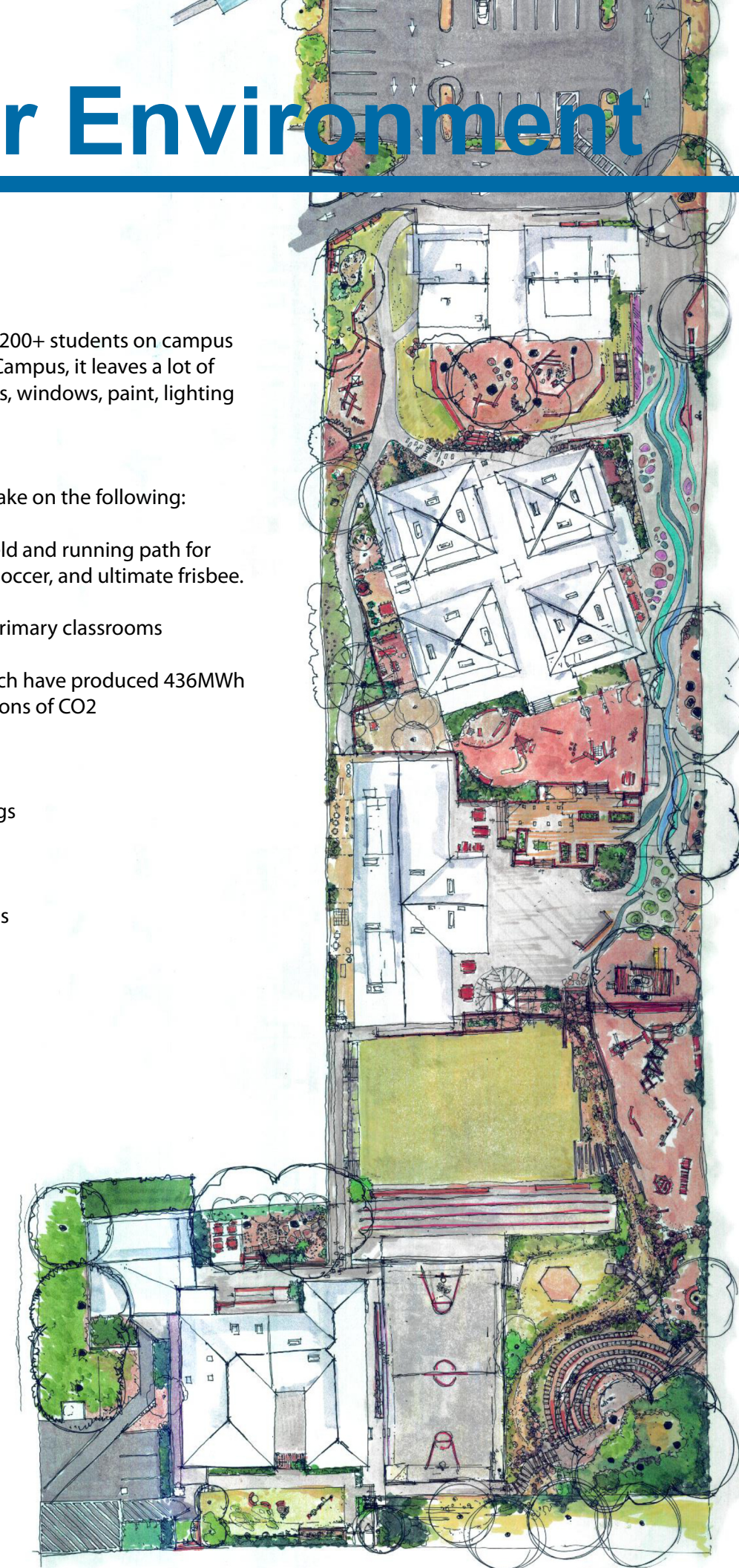
Facility Improvements

Every year we invest in our facility—with 200+ students on campus everyday and over 50 years on the Main Campus, it leaves a lot of wear and tear. We work to replace carpets, windows, paint, lighting regularly across both campuses.

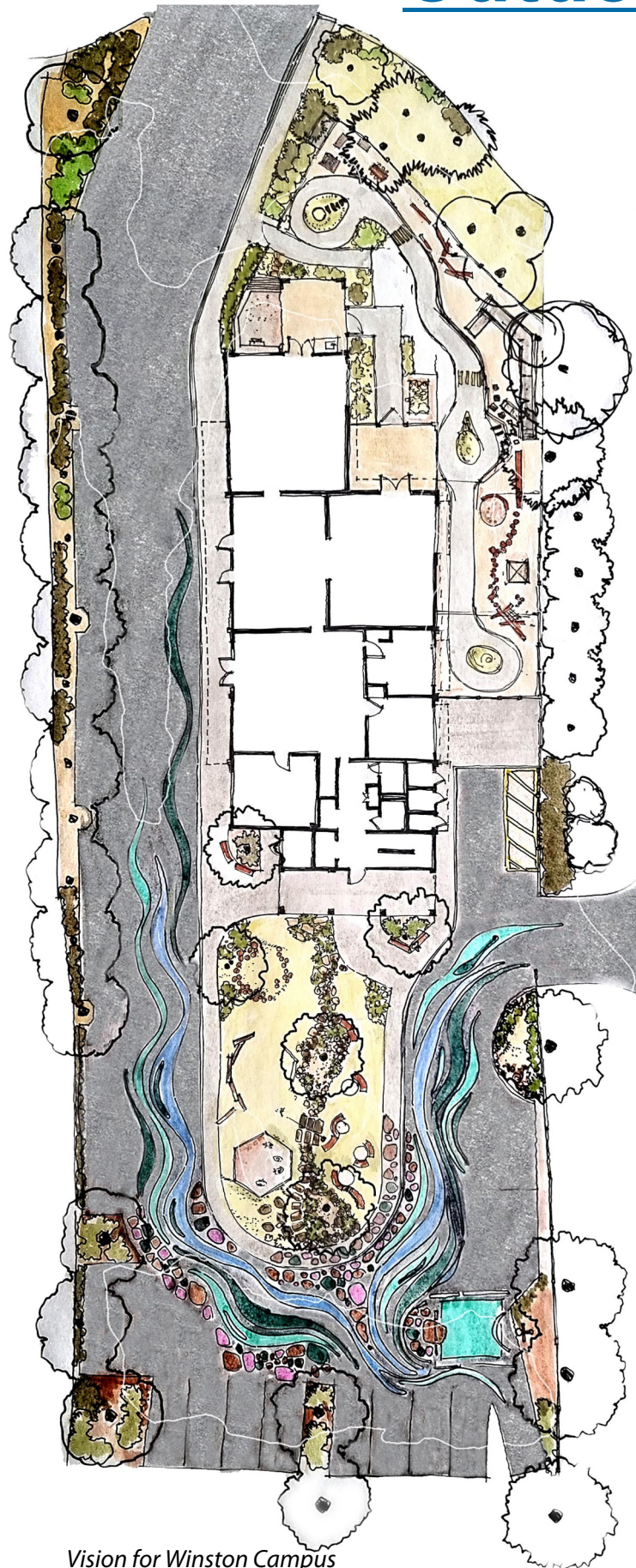
Over the last 8 years we've been able to take on the following:

- New 14,000 square foot Wavecrest field and running path for volleyball, track and field, volleyball, soccer, and ultimate frisbee.
- New floor to ceiling windows in the Primary classrooms
- Solar panels across both campus which have produced 436MWh and prevented production for 311.5 tons of CO2
- New Primary Playground
- Remodeling the Care and Art buildings
- New window coverings
- New Awnings on the Winston Campus
- Elementary outdoor gazebo
- Primary Sandbox

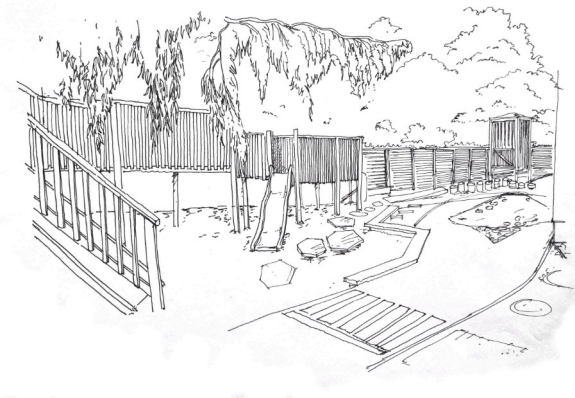
Vision for the Main Campus



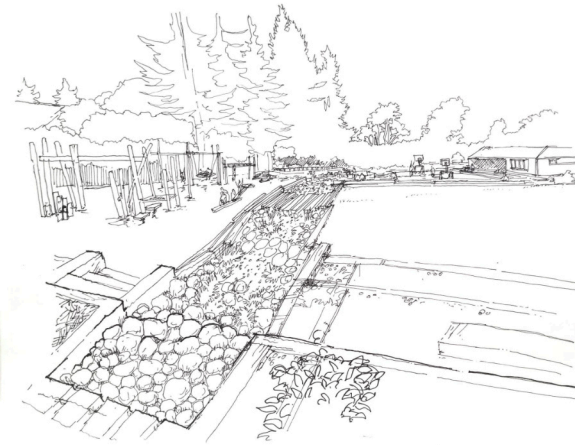
Outdoor Planning



Vision for Winston Campus



Redesigned YCC outdoor play area

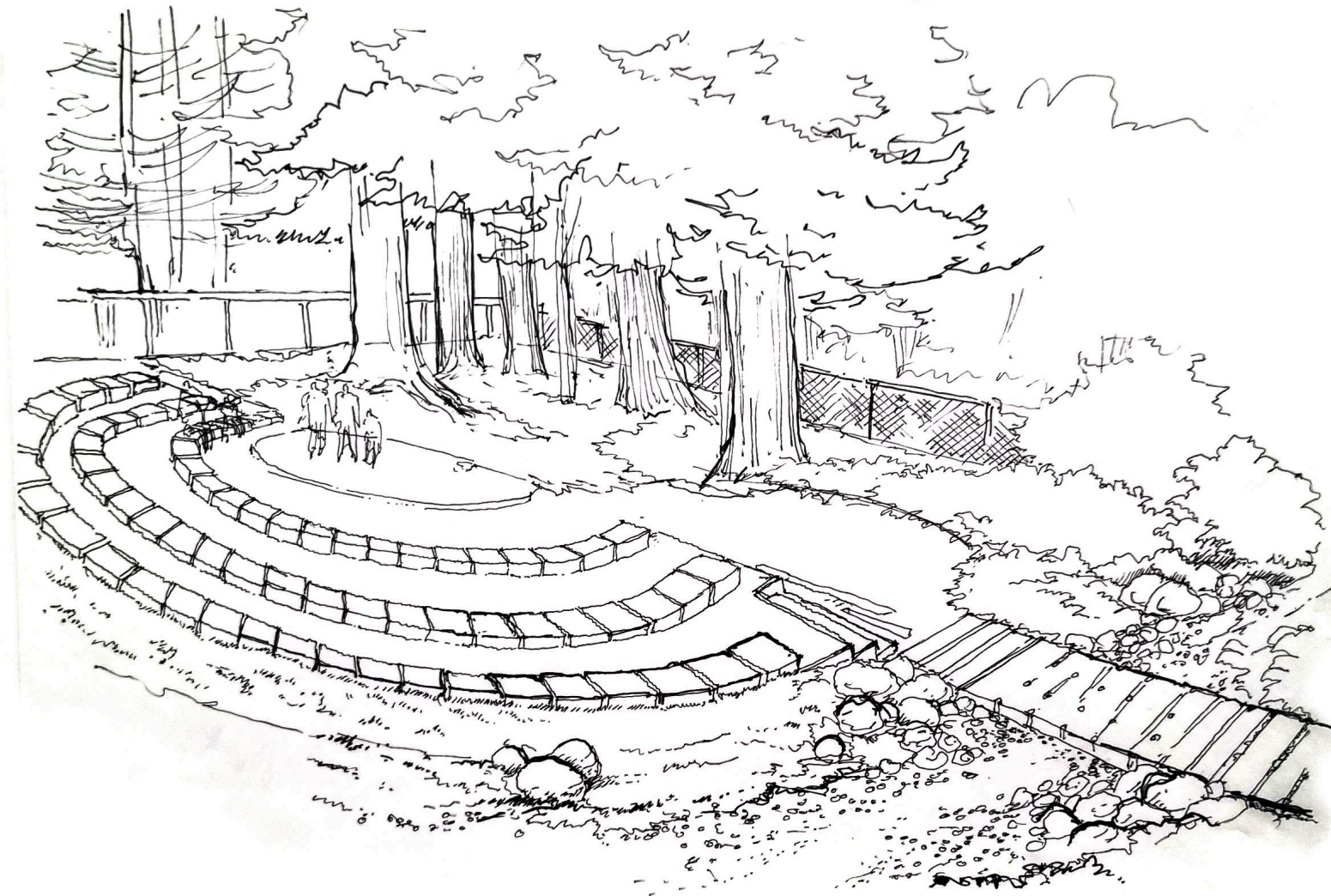


Elementary play area

SCM Outdoor Environment

We're getting ready to embark on our next phase of the strategic plan—the outdoor environment. This is not a project that will take a year or two, or even one that happens all at once. As part of the strategic plan we have laid out an initial vision to identify the different parts across the 3 acres of both of our campuses to reinvest in the student experience.

We look forward to sharing more as these visions solidify into plans and construction begins!



Outdoor amphitheater on the main campus

Annual Drive

The Annual Drive supports supplemental classroom materials and supplies, staff professional development, and facility improvements. It allows us to create the most supportive environment for our students.

Gifts from \$5
to \$30,000

74 donors
giving over 5+
years

210 Unique
Donors

Over
\$23k in
corporate
matches

Larry Abitbol & Shannon Durham
Stan & Lynne Abraham
Sybil Albrecht Lewis & Art Lewis
Juana Alfaro
Amarante Family
Anonymous
Antonakos Carlson Family
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Athenour Landscaping Inc.
Baldacci Family
Barker Cappelloni Family
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Mark Block & Gretchen Werner
Safiya Bonaventura
Max & Barbara Boyer
Luciano Bridi
Bridi Milligan Family
Dave Bunton
Calzetta Family
Chaos2Content
Bruce Christopher & Christy Hertzberg
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Cochran Sarto Family
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Keshia Conway Family
Robert & Patricia Craig
Stacy Craig & Jim Hanson
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Daoud Tholmer Family
DeNike Family
deSieyes Family
deSieyes Null Family
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DiPiero Family
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Haley Hedlin Family
Heim Family
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Ryan & Alison Holmes
Hughes Family
Darwin Hunt
Anthony & Helen Intintoli
Cristina Intintoli & Francis Sweetman
Jacobs Walker Family
Jensen Family
Juniper Networks
Jochum Family
Jones Family
Kantek Family
Kato Family
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Kelly LeBron Family
Kimbrough Radan Family
Kling Vickers Family
Krakowski Family
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Lanai Wealth Partners
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Lansing Family
LeGassick Family
Dan Likeness & Lucy Ramee-Likeness
Barbara Liszeo
Lotus Networks
Lucas Family
Mack Family
Madsen Sullivan Family
Mansfield Family
Martin Family
McKenzie Martinez
Dom & Karen Massaro
McBroom Family
McDonnell-Manson Family
McGuffin Family
Miroyan Family
Mongiello Pereira Family
Montgomery Family
Bob & Toni Montreuil
Carolyn Myoraku

Netflix Matching Gifts
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Ohana Wealth Management
Christopher & Molly Ohlsen
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Pantos Family
Nico Peruzzi & Ann Bolger Peruzzi
Taylor Porath
Elizabeth Posner
Tom Postlewaite & Maryse Lepoutre-
Postlewaite
Powers Stimpert Family
Prestwich Family
Restrepo Smith Family
Jane Reyes Family
Kathy & Leif Rideout
Ritchie-Douvas Family
Rosen Family
Roush Family
Santa Cruz Family Acupuncture
Kim & Brian Saxton
Matthew & Kirsti Scott
Selix Family
Sinclair Insurance Services Inc.
Singh Tut Family
Katherine Smith Family
SolSPACE
Morgan Spivey
Stauffer Lai Family
Strock Family
Woutje Swets
Talley Ramacho-Talley Family
Jenny Taskey
Victoria Thradow
Nancy Tkalevic
Gregory Timm
Kristin Tosello & Nina Noorzad
Trexel Christey Family
Matthew Tripp Family
Jann Turner
Kathleen Warfield
Williams Family
Guntram Wolski & Jeannine Rodems
Wulf Destro Family
Carol Yvanovich
Jacqueline Zaletel

Tuition Relief Fund Donors 2024-2025

At Santa Cruz Montessori, we have always believed that education thrives when our community stands together. For many years, Montessori has made education accessible and supported families through times of need through flexible tuition assistance. We have created the Tuition Relief Fund to offer temporary, emergency tuition assistance to families experiencing unexpected financial hardships.

Sybil Albrecht Lewis & Art
Lewis
Juana Alfaro
Anonymous
Apple Matching Gifts
Bay Federal Credit Union
Anne Bonner
Max & Barbara Boyer
Luciano Bridi
Bridi Milligan Family
Dave Bunton
Calzetta Family
Cheryl & Dennis Caspe
Chaos2Content
Bruce Christopher &
Christy Hertzberg
Community Foundation of
Santa Cruz County
Robert & Patricia Craig
Stacy Craig & Jim Hanson
Daoud Tholmer Family
Alaya Davila
Evan & Jamie de Sieyes
Family
DiPiero Family
Driscoll's Matching Gifts

Eirich Family
Erceg Family
Paul & Kristin Ferlito
Edith P. Frick
Trey Garlough & Julie
Morken
Michael & Lisette Gerald-
Yamasaki
Google Matching Gifts
Patty Lowney Gregory
Grillo Family
Haley Family
Hansen Family
Skip Hanson
Barbara & John Harker
Heim Family
Hendrix Family
Roger Holman
Hughes Family
Cristina Intintoli & Francis
Sweetman
Mary Ireland
Jochum Family
Kato Family
Kayser Larson Family
Glyndon Ruth Kimbrough

Kimbrough Radan Family
Kling Vickers Family
Terry Lai
Lanai Wealth Partners
Lansing Family
LeGassick Family
Lucas Family
Mack Family
Madsen Sullivan Family
Mahan Family
Mansfield Family
McBroom Family
McDonnell-Manson Family
McGuffin Family
Montgomery Family
Robert & Toni Montreuil
Morelli Behar Family
Netflix Matching Gifts
Nifield Family
Christopher & Molly
Ohlsen
Keith & Cheryl Otto
Julie Packard
Pantos Family
Peoples Ysaguirre Family
Nico Peruzzi & Ann Bolger

Peruzzi
Taylor Porath
Prestwich Family
Restrepo Smith Family
Kathy & Leif Rideout
Rosen Family
Roush Family
Sandoval Secomb Family
Santa Cruz Family
Acupuncture
Kim & Brian Saxton
Warren & Diane Seider
Sita Shapiro Family
SolSPACE
Morgan Spivey
Stauffer Lai Family
Robert Stephens
Jenny Taskey
Trexel Christey Family
Urgo Family
Kathleen Warfield
Witte Family
Wulf Destro Family

Average award:
\$12,971

\$218,642 in
support went to
single parent
families!

44% of our
families received
Flexible Tuition

AUGUST



- Start of the school year!
- We welcomed 11 new families to the school
- We hosted our annual workday and beautify the campus for the new year
- Guides, Emily, Kristin, Taylor, Martina, and Angela finished training!

September



- Cross country and girls basketball get under way
- We hosted Elementary Parent Development overview of social emotional learning
- After school Elementary classes begin: Chess, Piano, Ukulele, and gardening



- Save our Shores beach clean up

October



- Harvest Festival and 60th Anniversary celebration
- All Levels Parent Development - The Montessori Math Journey
- Camping trip! Wavecrest students go to Yosemite
- Upper Elementary goes to Wolf Camp at Mount Toyon
- Rainbow Day!
- Walk and Roll to School Day



- Dinner and Guest Speaker—Montessori: What Our World Needs with Jessie McCarthy
- Adobe goes to Sunset State Beach for camping
- Junior class goes to the symphony



November

- Upper El Great Work Fair
- Alumni come back to talk about how SCM has prepared them for high school at the Wavecrest Info Night
- Wavecrest annual pie baking and sale
- Boys basketball season begins



December

- Second day of parent teacher conferences
- Cypress Class Play—Wizard of Oz
- Boys basketball team plays at the Kaiser Arena
- SCM at the holiday parade



January



- All Levels Parent Development - The Montessori Language Journey
- Soquel Water District gives guest talk on local water project to Elementary classes
- Two Wavecrest student go to Morello, Mexico for six weeks in the intercambio (*exchange*) program

February



- Arts Auction Diamonds are Forever at the Chaminade
- Girls volleyball season beings
- Cypress class goes to the County Building with Supervisor Cummings
- Annual Community Open House
- Our Wavecrest students return from their intercambio and we welcome two students, Tzarara and Sofia, to our community!
- Monterey Bay Lion Dance Team comes and shares about Lunar New Year



March



- Wavecrest students share their poetry at the Radius Gallery at the Tannery
- Grandparents and Special Friends Day
- Spring Journey and Discovery
- Junior Class takes the bus to the Santa Cruz Mission
- Adobe and Sequoia Classes perform Charlotte's Web



April

- Elementary and Wavecrest students walk 975.5 miles at our Annual Walkathon for Second Harvest Food Bank and raised over \$11,000
- Track and Field and Ultimate Frisbee begins
- Lower El visits the farm



May

- Annual Spaghetti Thanksgiving to celebrate all of our parents and volunteers!
- Upper El trip to Camp Ocean Pines
- Wavecrest goes on Spring Odyssey to Puerto Rico



June

- Moving On Ceremonies
- We celebrate our 12 Wavecrest students moving on
- Summer Classes open for YCC, Primary, and Elementary Classes



Arts Auction

Thanks to our Business Donors

| | | |
|---------------------------------------------------------|----------------------------------------------------|-----------------------------------------------------------------|
| Adventure Sports Unlimited | Felton Feed & Pet Supply | Redwood Pizzeria |
| Agility Boulders | Fine Arts Museums of San Francisco | Reed Kuratomi, DDS |
| Annieglass | Fogo de Chao | Refuge |
| Another Banger | Freedom Bakery | Rehab Fitness Conditioning |
| Aptos Landscape Supply | Gabriella Cafe | Ridge Vineyards |
| Art Factory Studios | Gayle's Bakery & Rosticceria | Roaring Camp Railroads |
| Athenour Landscaping Inc. | Golden Chiropactic | Ruth Bancroft Garden & Nursery |
| Bachan Group | Good Life Ceramics | S. Martinelli & Company |
| Bargetto Winery | Hakone Estate & Gardens | San Francisco Museum of Modern Art |
| Bed and Biscuits/Groomingdale's | Harley Farms Goat Dairy | San Francisco Opera |
| Betty Burgers | Ibis Bicycles | San Francisco Symphony |
| Big Kahuna | In-N-Out Burger | San Francisco Zoological Society |
| Boardwalk Bowl | Izzy's Ices | San Jose Wind Symphony |
| Bonsai Heirloom | Jim Booth Swim School | Sanford's Martial Arts |
| Bookshop Santa Cruz | Kayak Connection | Santa Cruz Beach Boardwalk |
| Britannia Arms | Kennolyn Camps | Santa Cruz Children's Museum of Discovery |
| Broadway San Jose | Kianti's Pizza and Pasta Bar | Santa Cruz Family Acupuncture |
| Burrell School Vineyards | Kings Mountain Vineyards | Santa Cruz Mountains Winegrowers |
| Cafe Cruz | Kumon Learning Centers | Santa Cruz Museum of Art & History |
| Calicoastal Boutique | Kuumbwa Jazz Center | Santa Cruz Parkour |
| Capitola Beach Company | Lanai Wealth Partners | Santa Cruz Pasta Factory/Neto's Sausage Company |
| Capitola Reef | Laundry Day Watsonville | Santa Cruz Soccer Camp |
| Carousel Taffy & Treats | Levig Design | Santa Cruz Symphony |
| Caruso's Capitola | Lili Arnold Studios | School of Psychogeographic Arts |
| Chabot Space & Science Center | Lindsay Wildlife Experience | Seymour Marine Discovery Center |
| Chaminade Resort & Spa | Little Shop of Horticulture | Shadowbrook |
| Chaos2Content | Lumen Gallery | Shopper's Corner |
| Charles M. Schulz Museum | Marianne's Ice Cream | Skunk Train |
| Children's Discovery Museum of San Jose | Mercury Hot Springs | Slap Happy |
| Children's Musical Theater | Miritz-Bailey Real Estate | Smuin Ballet |
| China Peak Mountain Resort | MJA Vineyards | SolSPACE |
| Christine Klein, L.A.C., DAOM | Montessori Services | Soquel Smiles |
| Cinelux Theatres | Mountain Spirit | Soquel Vineyards |
| Clementine & Company | MusicalMe | Staff of Life |
| Colt Laser Craft | New Leaf Community Markets | Stagnaro's Charters |
| Community Music School | NHS, Inc. | Starving Musician |
| Costanoa Lodge & Camp | Nordic Naturals | Surf Dumpling |
| Costco | Nubia Swimwear | Swift Stitch |
| Craft Gallery | O'Neill Yacht Charters | Talmadge Construction |
| Craft Gallery | Oakland Zoo | Toque Blanche |
| CuriOdyssey | Opthalmology4Animals | US Bank |
| Dancenter | Out West Design | USS Hornet Sea, Air & Space Museum |
| deSieyes Brothers, LLC | Pacific Cookie Company | Valen Equestrian |
| Dharma's | Pacific Edge Climbing Gym | Vargas Academy of Gymnastic Arts |
| Discretion Brewing | Pacific Pinball Museum | Walnut Avenue Café |
| Dr. Donald T. Saposnek | Pacific Repertory Theatre | Walt Disney Family Museum |
| Drawn2Art | Palace Art and Office Supply | Web of Life Field School |
| Ercanbrack Siding Specialist | Paradigm Sport | Well Within Spa |
| eyeQ Optometry | Pelican Ranch Winery | Yvonne |
| Farm Discovery at Live Earth | Penny Ice Creamery | |
| Feejays | Pet Pals | |
| | Pottery Planet | |



Our annual Arts Auction was a huge success! Bringing together our community for a fun evening of Diamonds Are Forever to celebrate our 60th Anniversary. We raised over \$120,000 dollars for the arts. We are so grateful for all of our business donors and their generosity. This allows us to make so much possible: Elementary drama classes and plays, music (singing and drumming), our Spanish program, as well as purchasing classroom materials across all levels!



Arts and Classroom

Enrichment Donors 2024-2025

| | | |
|-------------------------------------------------------|---------------------------------------------|-----------------------------------------------------------|
| Ace's Flowers | Godsy Family | Martin Family |
| Laura Adams | Goebel Wheaton Family | Sharla Martin |
| Sybil Albrecht Lewis & Art Lewis | Goodland Bonura Family | McBroom Family |
| Alfaro Family Vineyards | Google Matching Gifts | McDonnell Harraher Family |
| Juana Alfaro | Greene Shipman Family | McGuffin Family |
| Amarante Family | Greenfield Krog Family | Miroyan Family |
| Apple Matching Gifts | Grillo Family | Erin Mongiello |
| Antonakos Carlson Family | Guimaraes Family | Montgomery Family |
| Athenour Family | Gunter Ross Family | Robert & Toni Montreuil |
| Athenour Landscaping Inc. | Haley Family | Morelli Behar Family |
| The Bachan Group | Patricia Hall Family | Moss Family |
| Blick Family | Debbie Hansen | Carolyn Myoraku |
| Mark Block & Gretchen Werner | Barbara & John Harker | Ness Family |
| Luciano Bridi | Michele & Steven Heaton | Netflix Matching Gifts |
| Bridi Milligan Family | Haley Hedlin Family | Cyndi Olgaray |
| Dave Bunton | Heim Family | Hendrix Family |
| Burton Canning-Burton Family | Herrick Family | High Godes Family |
| Natalie Cain | Highlywood Photography | Hollinger Beach Family |
| Campbell Family | Gabriela Ibarra | Cristina Intintoli & Francis Sweetman |
| Chaos2Content | Jacobs Walker Family | Jensen Family |
| The Christmas Light Pros | John & Joy Clay | Jochum Family |
| Conley Merikallio Family | Kato Family | Will Kahn Family |
| Stacy Craig & Jim Hanson | Lynne Keener | Kantek Family |
| Crawford Family | Kimbrough Radan Family | Kling Vickers Family |
| Daoud Tholmer Family | Krauskowski Family | Lanai Wealth Partners |
| Della Davis | Emily Lansdale | Law Beritzhoff-Law Family |
| de Sieyes Family | LeGassick Family | Levig Design Group, Inc. |
| de Sieyes Null Family | Levig Penrose Family | Olivia Locatelli |
| DiPiero Family | Lost Coast Media | Esther & Gary Lucas |
| Paige Dixon | Mahan Family | Mansfield Family |
| Judith Douvas | Marcinkowski Family | |
| Driscoll's Matching Gifts Specialist | | |
| Felix Family | | |
| Friedlaender Casey Family | | |
| Trey Garlough & Julie Morken | | |
| Michael & Lisette Gerald-Yamasaki | | |
| Gillen Ercanbrack Family | | |



Congratulations to our Wavecrest Class of 2025!



Kalyani Barberia-Shapiro



Honu Blick



Caitlin Bridi-Milligan



Iris Diener



Madeline Greenfield



Bridger Groff



Marion Hendrix



Maceo Kahn



Angeli Kimbrough



Adah Mansfield



Mikala Myers



Gwen Nifield



Maddie Nifield

Congratulations to the Wavecrest Class of 2025! We are excited to see all they accomplish at Soquel High School, Delta High School, and Pacific Collegiate School.



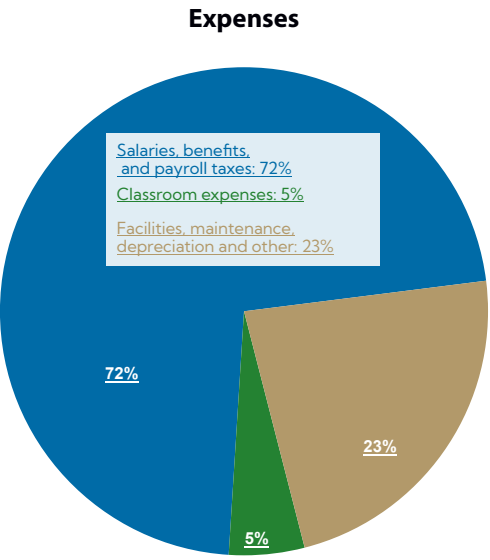
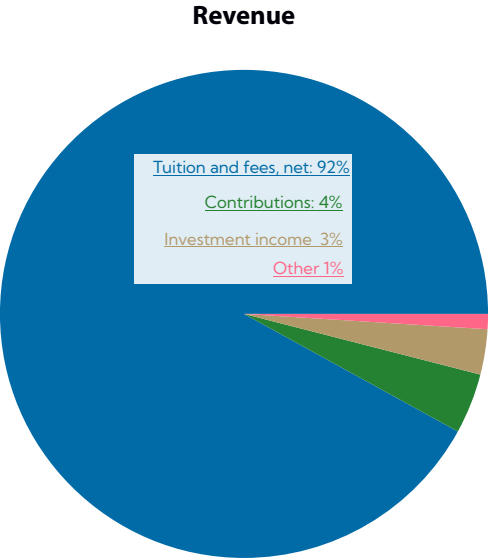
Financial Report

Fiscal Year Ending June 30, 2025

Our financial position remains sound. Enrollment remains above 200 students, and tuition rates have increased gradually at roughly 5% per year. This has allowed the school to continue to match the local public school district for head teacher compensation, which has increased substantially over recent years. We estimate that 72% of our income goes towards investing in our people to cover salary, wages, and benefits. Over 76% of expenses go straight into our academic programs and the rest supports our facilities, maintenance, insurance, and other non-program costs. We continue to navigate the balance of remaining fiscally strong while creating a sustainable environment for our students and staff.

We ended the year with our Tuition Assistance Endowment at \$342,220 and our Operating Reserve at \$761,233.

| Statement of Financial Position Information | June 30, 2025 | June 30, 2024 |
|-----------------------------------------------------|----------------------------|---------------|
| Assets | | |
| Total current assets and investments | \$4,475,596 | \$4,076,408 |
| Property and equipment (net) and other assets | \$6,638,901 | \$6,575,306 |
| Total assets | \$11,114,497 | \$ 10,651,714 |
| Liabilities | | |
| Total current liabilities | \$488,791 | \$426,353 |
| Total long-term liabilities | \$3,759,374 | \$3,939,330 |
| Total liabilities | \$4,248,165 | \$4,365,683 |
| Net Assets | | |
| Without donor restrictions | \$6,209,462 | \$5,670,340 |
| With donor restrictions | \$656,870 | \$615,691 |
| Total liabilities & net assets | \$11,114,497 | \$ 10,651,714 |
| Statement of Activities Information | Fiscal Year Ended June 30, | |
| | 2025 | 2024 |
| Revenue | | |
| Gross tuition & fees | \$6,963,161 | \$6,672,429 |
| Less: tuition assistance discount on tuition & fees | \$(1,364,355) | \$(1,273,822) |
| Net tuition & fees | \$5,598,806 | \$5,398,607 |
| Contributions | \$231,758 | \$228,612 |
| Investment income (loss) | \$184,999 | \$180,963 |
| Other | \$98,213 | \$81,523 |
| Total revenue | \$6,113,776 | \$5,889,705 |
| Expenses | | |
| Academic program | \$4,239,600 | \$ 4,163,711 |
| Management and administration | \$1,112,210 | \$979,922 |
| Fundraising | \$181,665 | \$180,143 |
| Total expenses | \$5,533,475 | \$5,323,776 |
| Change in net assets | \$ 580,301 | \$ 565,929 |



Program Stats Enrollment

YCC: 18

Primary: 76

Lower El: 44

Upper El: 49

Jr. High: 26

*End of Year

Staff Numbers

YCC: 7

Primary: 14

Elementary: 8

Junior High: 5

Learning Support and Program Specialists: 7

Administrative, Development, and Other Support Staff: 7



2024-2025 Board Members

Sophie Davenport, Josh Blick, Christine McBroom, Evan deSieyes, Angela Bridi-Milligan, Caroline Montgomery, Kim Saxton, Melissa McGuffin, Brian Heim, Chris Ohlsen, Kendra Hansen, Trey Garlough,

Thanks to our Class Ambassadors!

| | | |
|------------------------------------------------------------|-----------------------------------------------------|------------------------------------------------------|
| <u>Mulberry</u> Ona Jones | <u>Monarch</u> Hailey Spencer Lauren Talmadge | <u>Junior</u> Sara Hendrix Josh Blick |
| <u>Fireside</u> Brittany Lucas Kaori Roman | <u>Willow</u> Michelle Lai Natalie Mahan | <u>Cypress</u> Rachel Roush |
| <u>Redwood</u> Caroline Montgomery Adriana Krakowski | <u>Adobe</u> Journey Talkovic | <u>Wavecrest</u> Sita Shapiro Deauna Mansfield |
| <u>Poppy</u> Caasi Banura Rajindar Tut | <u>Sequoia</u> Marta Strock Will Crawford | |

Thank you to everyone who participated in our Parent Development

- YCC Parent Development - Supporting Toileting Independence
- Primary Parent Development - Healthy Boundaries, Happy Child
- All Levels Parent Development - The Montessori Math Journey
- Montessori: What Our World Needs -: Jessie McCarthy
- YCC Parent Development - Dinner & Movie
- All Levels Parent Development - The Montessori Language Journey
- Journey & Discovery

Thank you to members of our committees

- Development Committee
- Community Support & Social Events Committee
- Finance Committee
- Yearbook Committee

Upcoming SCM Events



Arts Auction, February 28th

Sail away with us at our Art Auction Dinner & Gala at the Chaminade Resort & Spa! This year's theme is Set Sail for the Arts. Enjoy smooth sailing and some high-seas bidding during our silent and live auctions. Help raise funds to support our arts programming—and don't miss the boat. This is a night you won't want to miss!"

Grandparents and Special Friends Day, March 13th

Grandparents and special friends are invited to visit their student's class. This open house event allows guests to drop in anytime between 9:30–11:30.

Grandparents and friends may bring your child to school that morning and then return to check in at the Community Room next to the front office. Enjoy coffee, tea, and snacks for all of our special guests.



Spaghetti Thanksgiving, May 2nd

Come join us May 2nd for our annual Spaghetti Thanksgiving. We are grateful and thankful for all of the volunteer hours from our community. We look forward to seeing everyone there for spaghetti and a student talent show.