



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

Christine R. McBroom

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
Alaya Davila
Amanda Crawford
Angela Bridi-Milligan
Angela Henrickson
Barbara Harker
Chris Nestlerode
Clara Thranow
Cristina Intintoli
Dalila Leon
Danieka Erasmus

Danit Christensen
Dave Bunton
Emily Lansdale
Flor Chavez
Gaby Ibarra
Hannah Stublefield
Jenny Taskey
Jessica Cannarozzi
Jill Matthies
John McGuffin
Juana Alfaro
Julie Parraguirre

Karina Chavez
Sixtos
Kathy Warfield
Kim Miles
Kim Saxton
Kristen Davison
Kristin Tosello
Laura Peduto
Lizzy Miller
Madison Gillen
Maggie Cone
Mariah Lambert

Martina Erusnay
McKenzie Martinez
Melissa McGuffin
Michael Ann
Jacobson
Mikayla Kraatz
Molly DiPiero
Morgan Spivey
Nina Noorzad
Olivia Locatelli
Patty Stone
Pearl Vickers

Regina Radan
Sequoia Christensen
Sophie Davenport
Stacy Craig
Sydney Mongiello
Taylor Holter
Vic Thranow
Victoria Frichner
Wesli Caddes



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.

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



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

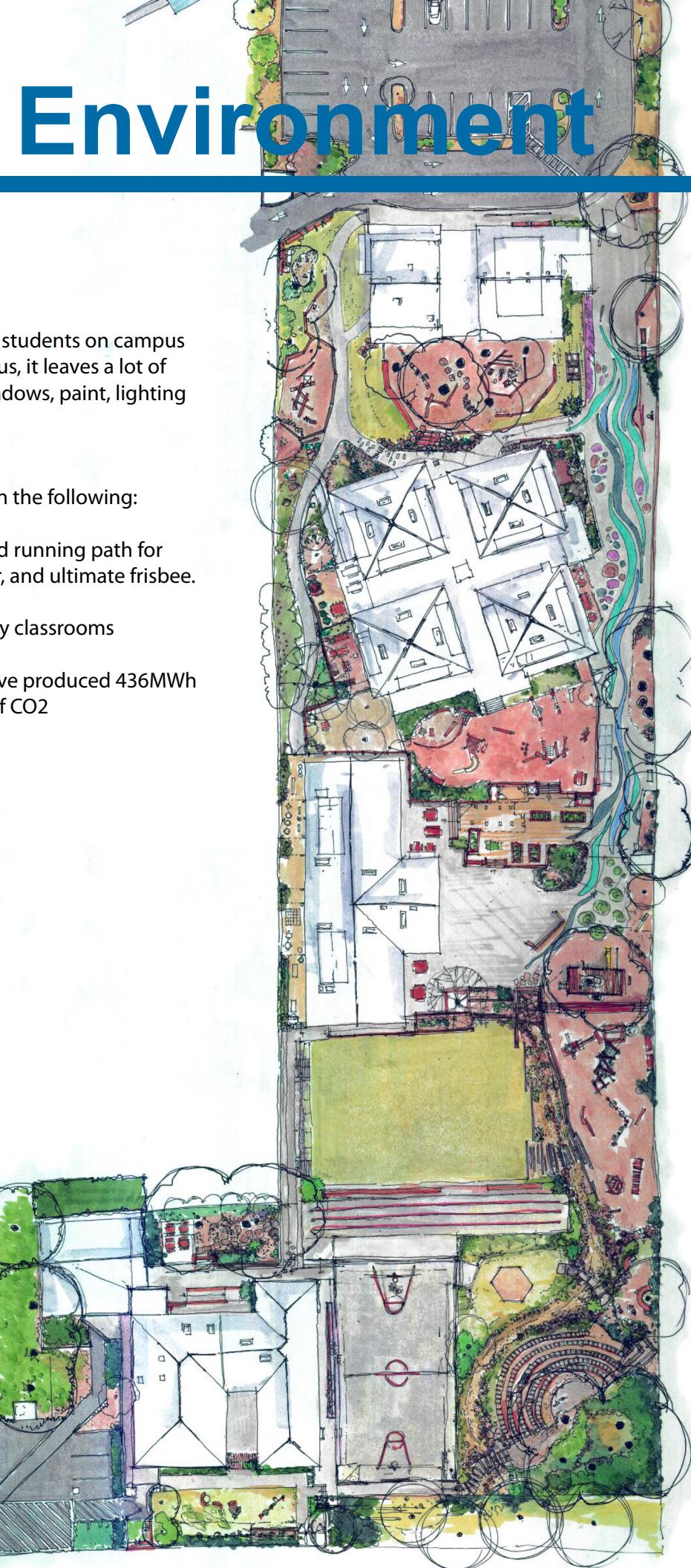
Facility Improvements

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.

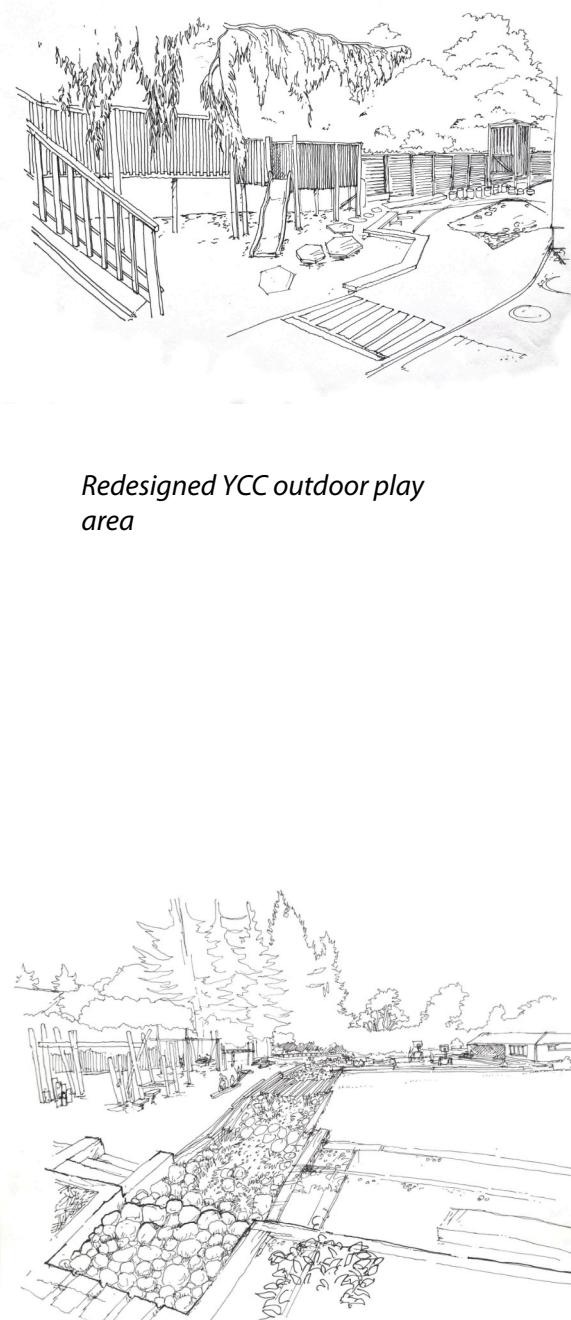
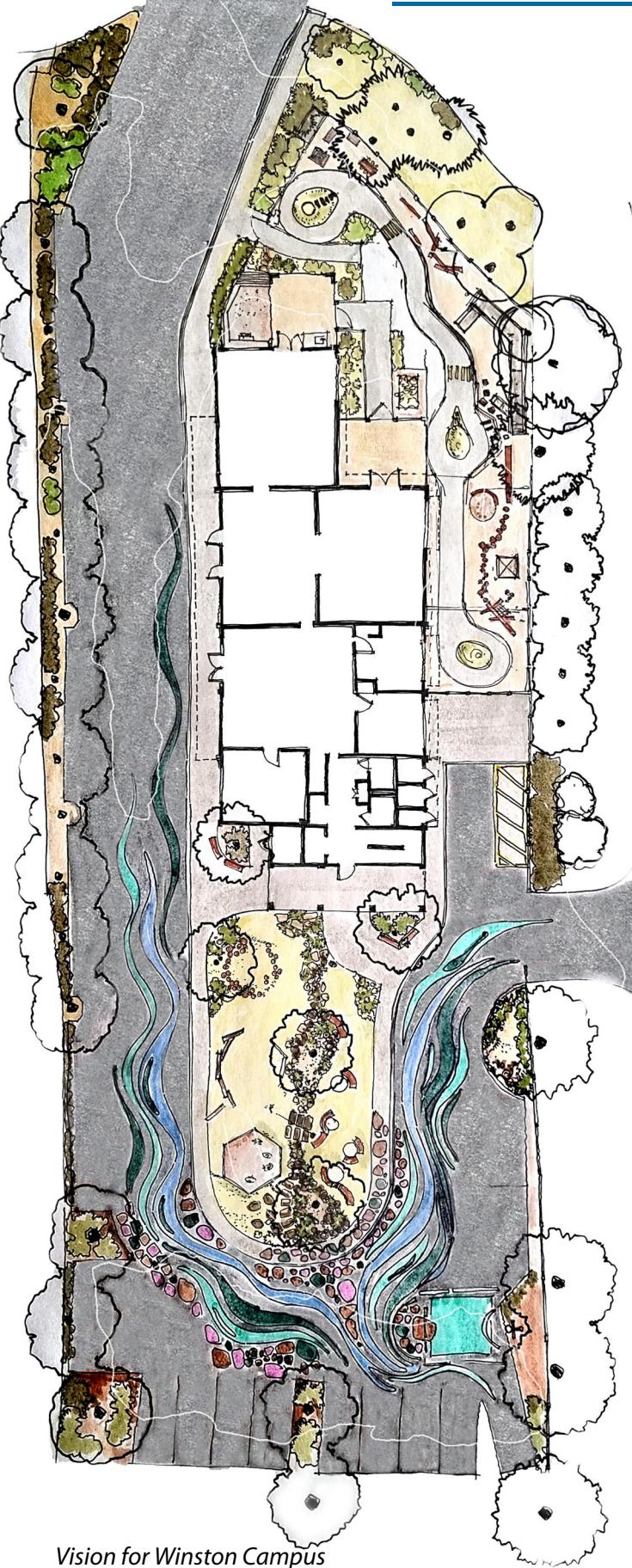
Over the last 8 years we've been able to take on the following:

- 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



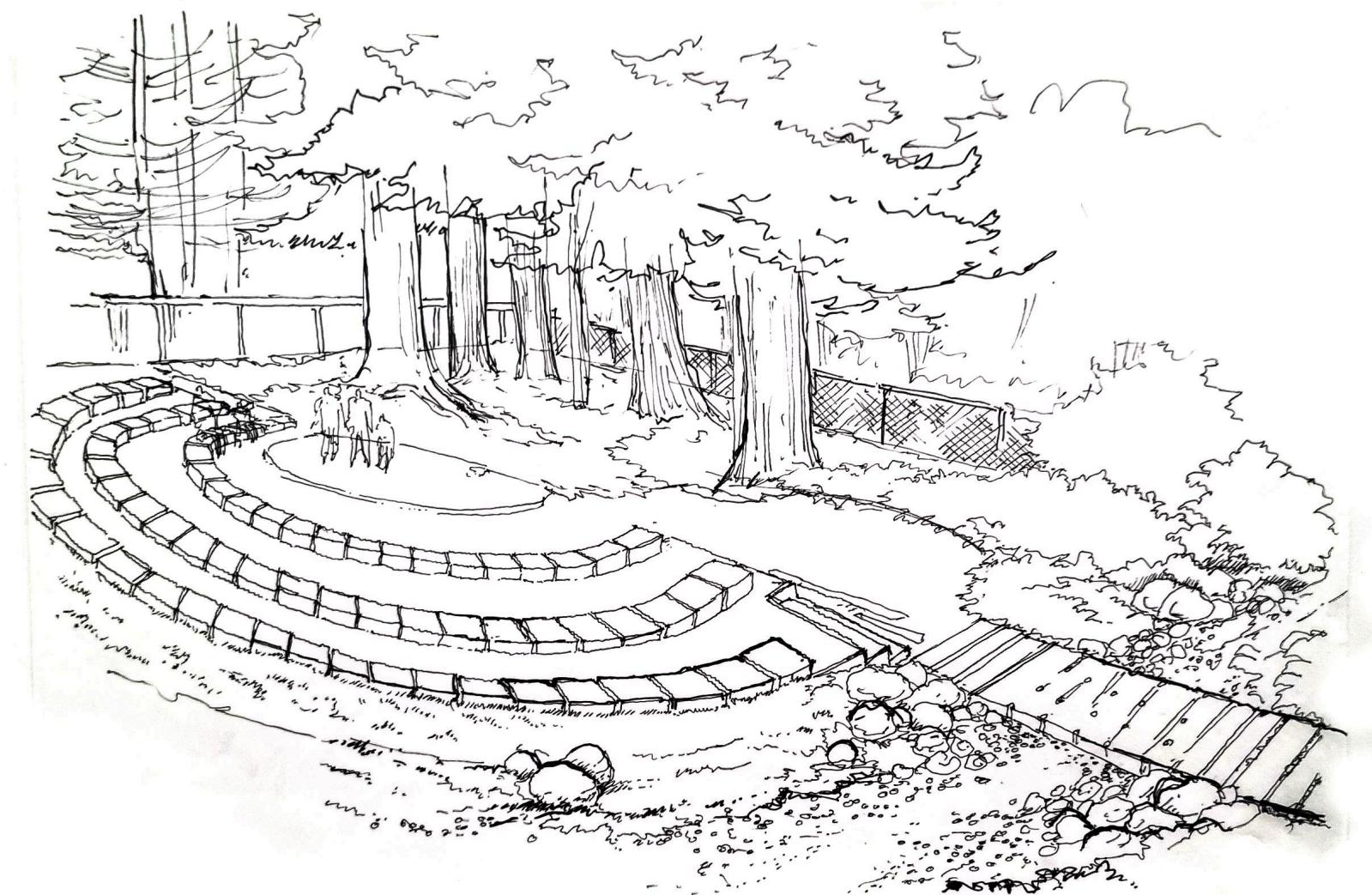
Outdoor Planning



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!



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
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Amarante Family
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McBroom Family
McDonnell-Manson Family
McGuffin Family
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Montgomery Family
Bob & Toni Montreuil
Carolyn Myoraku

Netflix Matching Gifts
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Pantos Family
Nico Peruzzi & Ann Bolger Peruzzi
Taylor Porath
Elizabeth Posner
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Restrepo Smith Family
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Ritchie-Douvas Family
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Solspace
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Strock Family
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Nancy Tkalcevic
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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.

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Juana Alfaro
Anonymous
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Bay Federal Credit Union
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Calzetta Family
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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

Average award:
\$12,971

Erceg Family
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

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

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
Barbara & John Harker
Heim Family
Hendrix Family
Hughes Family
Cristina Intintoli & Francis Sweetman
Mary Ireland
Jochum Family
Kato Family
Kayser Larson Family
Glyndon Ruth Kimbrough

Peruzzi
Taylor Porath
Prestwich Family
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Rosen Family
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Sandoval Secomb Family
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Sita Shapiro Family
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Morgan Spivey
Stauffer Lai Family
Robert Stephens
Jenny Taskey
Trexel Christey Family
Urgo Family
Kathleen Warfield
Witte Family
Wulf Destro Family

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 Morellio, 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](#)
[Agility Boulders](#)
[Annieglass](#)
[Another Banger](#)
[Aptos Landscape Supply](#)
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[Community Music School](#)
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[Kayak Connection](#)
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[San Francisco Opera](#)
[San Francisco Symphony](#)
[San Francisco Zoological Society](#)
[San Jose Wind Symphony](#)
[Sanford's Martial Arts](#)
[Santa Cruz Beach Boardwalk](#)
[Santa Cruz Children's Museum of Discovery](#)
[Santa Cruz Family Acupuncture](#)
[Santa Cruz Mountains Winemakers](#)
[Santa Cruz Museum of Art & History](#)
[Santa Cruz Parkour](#)
[Santa Cruz Pasta Factory/Neto's](#)
[Sausage Company](#)
[Santa Cruz Soccer Camp](#)
[Santa Cruz Symphony](#)
[School of Psychogeographic Arts](#)
[Seymour Marine Discovery Center](#)
[Shadowbrook](#)
[Shopper's Corner](#)
[Skunk Train](#)
[Slap Happy](#)
[Smuin Ballet](#)
[Solspace](#)
[Soquel Smiles](#)
[Soquel Vineyards](#)
[Staff of Life](#)
[Stagnaro's Charters](#)
[Starving Musician](#)
[Surf Dumpling](#)
[Swift Stitch](#)
[Talmadge Construction](#)
[Toque Blanche](#)
[US Bank](#)
[USS Hornet Sea, Air & Space Museum](#)
[Valen Equestrian](#)
[Vargas Academy of Gymnastic Arts](#)
[Walnut Avenue Café](#)
[Walt Disney Family Museum](#)
[Web of Life Field School](#)
[Well Within Spa](#)
[Yvonne](#)



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

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[Godsy Family](#)
[Laura Adams](#)
[Goebel Wheaton Family](#)
[Sybil Albrecht Lewis & Art Lewis](#)
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[Lanai Wealth Partners](#)
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[Lost Coast Media](#)
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[Michael & Lisette Gerald-Yamasaki](#)
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[Marcinkowski Family](#)
[Gillen Ercanbrack Family](#)
[Martin Family](#)
[Sharla Martin](#)
[McBroom Family](#)
[McDonnell Harracher Family](#)
[McGuffin Family](#)
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[Erin Mongiello](#)
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[Robert & Toni Montreuil](#)
[Morelli Behar Family](#)
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[Sandoval Secomb Family](#)
[Kim & Brian Saxton](#)
[Warren & Diane Seider](#)
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[Solspace](#)
[Strock Family](#)
[Strock Real Estate](#)
[Talmadge Construction](#)
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[Jenny Taskey](#)
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[Tayler Wilkins Family](#)
[Wright Shah Family](#)
[Carol Yvanovich](#)



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.



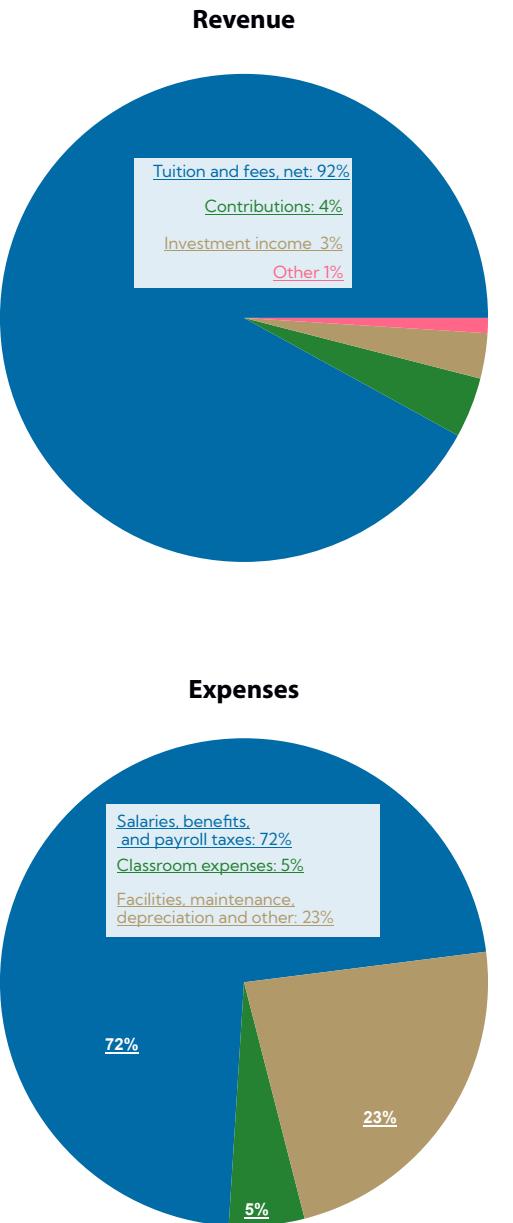
Financial Report

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!

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