

## Founder's Report

*"I like school because I work everyday and see my friends!" Vincent, Rm. 2*

My dream, to develop a school, took months of planning. Initial talks began in the fall of 1970. The first task was to interest other people to assist us with financing, planning, development, and meeting state and local requirements. My husband, Paul Sager, was determined to follow-up on my dream. He said, "write a plan of what you want in a school."

Under Paul's guidance, Santa Fe Montessori School became a reality, in rented classrooms at first. Then in early 1972, construction began at the Marine View Avenue site. It was exciting to watch the first three classrooms under construction. They opened in 1972. As the years went by we added additional classrooms.



In 1973, we opened the elementary school on Academy Drive, and later moved it to the portable buildings now housing the Toddler Community. We opened with 50 children -- ages 6-9. A year later we initiated the 9-12 program. I had the pleasure of forming the first class and being the teacher. In the early 1990s, we built the present elementary building, with an 81 student capacity. In a few years it was fully enrolled.

Finally, in 1998, we opened the Toddler Community, a program for which there proved to be high demand. This program continues today with some of the most adorable children I've ever come across.

From 1971 to 2009, I estimate that Santa Fe Montessori School has served more than 5,000 families. I call that a **dream fulfilled!**

Nancy T. Sager, Founding Director and Former Head of School, now retired

## Head of School 's Report *"I love when Mr. Walter pushes us on the tire swing!" Declan, Rm. 3*

2008-2009 began in gloom as the national economy appeared on the verge of collapse, and ended in new school confidence, as we avoided our worst fears – enrollment drop.



Just when it looked like we faced substantial end-of-year red-ink and drastic measures to erase it, our Board of Directors asked SFMS parent and Director, Michael Akavan, to form a new committee to find solutions. Michael's committee made student retention an essential goal. With assistance from the SFMS Parent Association, led by LeAnn Rytz, we held a series of parent seminars featuring SFMS teachers and alumni, highlighting the importance of our full program, toddler through Jr. II, to ensure that each child realizes the full Montessori promise.

In administration, we hired Business Manager, Christy Foley. With help from SFMS Bookkeeper, Ana Aguila, Christy put new budget controls in place, located hidden budget resources, and recommended fundraising. Under Christy and Ana's thorough approach, our fears of deficits began to recede. Our new development director, Karen Berger, worked with SFMS Director, James Barter, to form a new SFMS Fundraising Committee. Their committee provided the blueprint for our first annual appeal letter-drive and a plan to revive our gala-auction fundraiser. The outcome was budget-gap closing philanthropy—over \$80,000 in funds raised, and a measure of the generosity of our SFMS community.

Other changes: we installed a new telephone system for improved parent/school connectedness—just ask administrative assistant Conny Zijlstra about the value of this improvement! We purchased new furniture—

(continued from page 1) chairs for Children’s House. With help from SFMS parent, Jennifer Busick, we created a new website--a digital way to do all kinds of things at SFMS: [www.santafemontessori.org](http://www.santafemontessori.org).

This summer, a crew of intrepid SFMS handy-men outdid themselves cleaning, painting, mixing concrete, sandblasting, replacing, removing, moving, installing, digging, constructing and beautifying. Every bathroom was renovated; patio fences received new lumber, support posts, and paint for a stronger, brighter landscape. We moved the playground train so our Toddlers could enjoy it. A new tire swing is delighting our Children’s House students. Look for these and other improvements and realize that you made them happen!

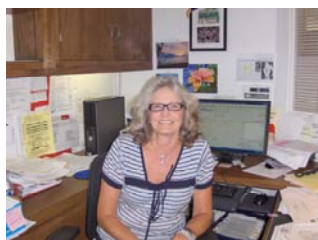
Our challenge going forward is to continue our momentum. The economy remains a concern, and we are all mindful of its effect on our families. All in all, 2008-2009 was a watershed year. By working together we addressed crisis and became a stronger organization, and along the way fulfilled our Mission goal to build “...a partnership with our parents for the benefit of the children...”

Walter Huebscher, Head of School

## Business Manager’s Report

*“I like doing numbers!” Jordan, Rem. 5*

The Business Office implemented several changes in 2008/09—converting our PeachTree files to QuickBooks for improved accounting oversight. After a transition period, we were able to do the monthly financial reporting in-house, at a considerable cost-savings, rather than using a CPA firm.

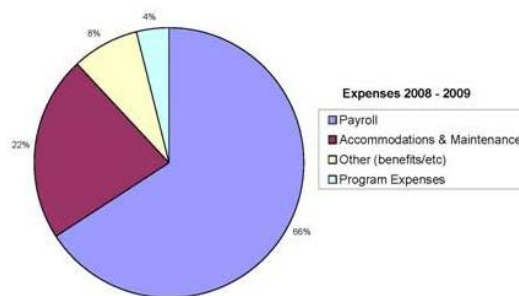
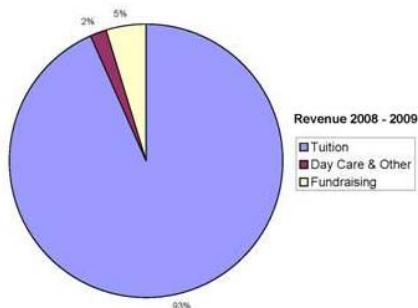


We also achieved improvement in tuition collection by changing to ACH debits from customer bank accounts. Dewars Tuition Refund Insurance, used by most major tuition-based schools, insured our tuition receivables, and virtually eliminated the possibility of losses due to enrollment withdrawal. It also allowed families who had paid their tuition in advance to receive a partial refund at no expense to the school.

Improved enrollment, coupled with a modest mid-year increase in tuition rates, resulted in a positive Net Income this past year. Fundraising also helped our cash position. Our Annual Fund drive and Gala dramatically increased revenues, from the 2007/08 total raised of \$8,700 to \$80,000 in 2008/09.

Total Liabilities and Equity increased 24.5% during the past year. Additionally, our cash position in 2008-2009 increased by 16%. Going forward, Santa Fe Montessori will start the new school year on solid ground, after a very successful Summer Session, grossing \$90,000, and an overall balanced budget of approximately \$1.8M.

Christy Foley, Business Manager



## Fundraising Chairman's Report *"I like the tire swing – it gives me fresh air" Juliet, Ron 4*

When the Santa Fe Montessori School opened its doors to forty-eight children in 1971, founder Nancy Sager called it, "The little School on the Hill." It was a single room on a knoll by the ocean, surrounded by a bare field and sand playground. Nancy was Head of School, accountant, receptionist, nurse, teacher, handywoman, and interpreter of Maria Montessori's principles for childhood education.



How times have changed. As the 21<sup>st</sup> Century presses onward, Nancy's school has expanded and acquired complexities common to private schools everywhere. And it's ability to carry on the Montessori principles that empower children now rely, in part, on the generosity of those within our community.

By design, tuition no longer covers all of the expenses of an SFMS education. As with many other large Montessori schools, we have turned to fundraising as an alternative to the tuition increases that would put an SFMS education out of the reach of many families.

Tuition now covers about 90% of the real annual cost of a child's SFMS schooling. We bridge the gap with tax-deductible gifts to our Fall Letter Drive and our Annual Gala Fund Raiser. Last year, in down economic times, we raised an amazing \$80,000.

This generous infusion of money purchased much-needed new computers and monitors, classroom materials, fresh paint and fencing, and added to our scholarship fund. The squeals of delight heard as children spin on our new tire swing attest to the success of our many playground changes.

We have set the goals for this year's fundraising even higher as we strive for 100% family participation. Gifts of time, money, and talents by parents, grandparents, alumni, and friends support the excellence we recognize at SFMS.

Every donated dollar stays at school, and every donation and donor counts. Every gift, no matter the amount, is a treasured statement of our community's shared vision and commitment to our children. It's hard to imagine a more powerful team than a school and its parents working together to achieve Nancy Sager's dream.

James Barter, SFMS Director & Fundraising Chairman

## Development Director's Report *"I like Monkey Bars because I like to climb!" Anya Ron. 4*

You've already read about the achievements of 2008-2009. So I'd like to use this space to express deep appreciation on behalf of everyone at SFMS to all of you who gave of your precious resources to secure the school during a down economic year –perhaps the worst of our lifetime.

Your response humbles us and inspires us to continue in the direction we are going. Your outpouring of family generosity and good will is truly heartening. Everyone and everything at SFMS is better because of your philanthropy. Thank you, thank you.

Our challenge this year is to make our accomplishments—especially the strong school–family partnerships that emerged in 2008, a part of our foundation at SFMS. We hope you see the difference your giving has made, and invite you to help us fulfill the SFMS promise of "Education for Life."

Karen Berger, Development Director

# Annual Fund Donors & Supporters "I like to push the swings!" Hudson, Rem. 4

## SFMS Montessori Circle

Teresa Schiappa

## SFMS Founders Circle

Declan & Jennifer Caulfield  
James & Kimberly Caccavo  
James Flores & Anna Danes  
Josh Lampl  
Julie Zizka

## SFMS Head of School Circle

Michael & Anita Akavan  
Jed Baker & Maria-Jose Zeledon  
James Barter  
Donald Ficken  
Gabriela Flores  
Patrick & Christy Foley  
Walter & Cynthia Huebscher  
Michael & Gulalai Rafiq  
Paul & Nancy Sager  
Roy & Nancy Salameh  
James & Kathy Stenger  
Sjirk & Conny Zijlstra

## SFMS Parents Circle

Marshall & Ana Carder  
Jerry Dwek & Christine Chung  
Cindy Friedman  
Michael & Tiffany Deal  
Dennis & Julie Feenaghty

## SFMS Parents Circle (con't)

Andrew & Carol Higgins  
James & Liliana Sanders  
Pauline Schiappa  
Gabriel & Denise Wheeler  
James Hagan & Vicki Wolfrum  
Cathy Zoeckler

## SFMS Friends Circle

John & Sofia Alessio  
Judy Arrizza  
Jennifer Busick  
John & Kathy Deal  
Trey & Toni Fairman  
Armondo & Ana Garza  
Brett & Brandy Gossett  
Yu-po & Alison Lee  
Sevgi Miracle  
Tom & Frances Powell

## SFMS Supporters

Ana Aguila  
Barbara Belli  
Stephen Bick  
Chad & Tina Butler  
Norman & Michele de la Cruz  
Thanh Duong & Thuylinh Nguyenle  
Carlos & Rynn Gomez  
Silvana Gragossian  
Kevin & Brenda Hand  
Claudia Hetzer

## SFMS Supporters (con't)

Linda Jacoway  
Annie Kaskade  
Jill Larson  
Danielle Livolsi  
Erika Llevat  
Kourosh & Farnaz Mehrayin  
Doraly Quinonez  
Josh & LeAnn Rytz  
Zahra Sadeghi  
Sean & Norma Shannon  
Alyssa Siffert  
Radha Sundaram  
Roger & Erin Sur  
Sandra Vangilder  
Anita Varzi  
Mary Vasile  
Jay Warren

Note: If you don't see your name on this list and believe it should be included, contact our Development Office: 858-755-3232, ext. 111.

*Thank you, thank you! Your gifts fund smiles!*



## Parent Association Leader's Report "I like playing princesses! Anjali, Rm. 5

The Parents' Association at Santa Fe Montessori School was created by a small group of parents four years ago to establish a sustainable and vibrant school community. Our goals were to enhance school communication, support teachers and staff, encourage excellence in student development, and promote involvement in school and community.

To meet these goals in the 2008-2009 school year, the PA sponsored events that provided our parents opportunities both to meet socially and volunteer their time and talents to the school. In order to emphasize the importance of parent involvement, we employed the slogan "*Be Involved, Get Connected*".



To facilitate better communication, the PA sent weekly emails to share with parents and teachers messages that related to SFMS and its activities. At the same time, we redesigned our website with updated calendars and important information. We used these approaches to help parents feel connected to the school and learn of the many ways they can become involved.

We also held a number of events: a Back-to-School Ice Cream Social for teachers, parents, and students, and our *Moving up in Montessori* evenings, at which alumni spoke of their achievements, fond memories of SFMS, and how SFMS prepared them for further education. Service activities were another way for school members to connect. We conducted a beach clean-up, invited SFMS children to write Valentine letters for seniors, and held a charity holiday drive to collect food and bikes for less fortunate families in our area.

To pay for these activities, the PA asked parents for sponsorship donations. Thirty-five percent of our families participated in 08/09, giving a total of \$6250. We used these funds to buy new class materials and toys for our playgrounds, and to hold educational assemblies. Other small fundraisers also helped sustain our activities: Gift Wrap, Gift Cards, and Box Top sales, eScrip participation, and our Chevy's Restaurant Nights.

We want to encourage our families to "*Stay Connected.*" Energized by the success of 2008/2009, the board members of the SFMS PA are eager to continue their work in the new school year, and we hope that many more parents will join us as we help to make a school we love an even better place for our children.

LeAnn Rytz, SFMS Parent Association President

Kathy Stenger, SFMS Parent Association Vice President

## Parent Association Donors

"I like doing playdough!" Teagan, Rm. 5

### Diamond

The Buckley Family  
The Caccavo Family  
The Church Family

The Deal Family

The S. Finley Family  
The Galante Family  
The Gould Family

The Lampl Family  
The Michen Family  
The Quintana Family  
The Orkish Family  
The T. Schiappa Family  
The Tung Family  
The J. Zizka Family

### Platinum

The Berkstein Family  
The Blue Family  
The Carder Family

The Higgins Family

Intuit Corporation  
The Lebovitz Family  
The Powell Family

The Rafiq Family  
The Richards Family  
The Rytz Family  
The Sanders Family

### Gold

The Gossett Family  
The Trommer Family

### Silver

The Busick Family  
The Chandra Family

### Bronze

The Chen Family  
The Duong/Nguyenle Family  
The Garza Family

*Thank you, thank you!*

## Ways to Give at SFMS

*"I like to ride bicycles!" Lakesanne, Rm 2*

There are lots of ways to give at SFMS. Every year our Parent Association recruits volunteers to help with classroom parties, school assemblies, holiday events, and teacher appreciation. These activities make SFMS special and provide opportunities for SFMS parents (and grandparents) to be an active, hands-on part of our school. The Parents Association does its own fundraising to support its program: tax-deductible sponsorships, eScript, Gift Card, and Holiday Wrap sales are all part of their program.

Our development office provides other opportunities to give, and asks parents (and grandparents) to join two vital efforts—our fall "Funding Smiles" Campaign, and our spring Gala - Auction. These are major school-wide fundraisers that aim to close the "tuition gap," described in the fundraising chairman's report. These efforts help us keep tuition low for all SFMS families, and offer end-of-year tax deductions for every contribution. We aim for 100% participation and hope that all of our families will make SFMS their number one philanthropic priority while they are part of our school community. Gifts of money, appreciated securities, vehicles, in-kind donations, and contributions of time and skill are essential to our program. We urge our families to contribute to our "Funding Smiles" Campaign and our Gala- Auction by becoming committee members. Our 2009-2010 "Funding Smiles" Campaign Chairperson is Brenda Hand, and our Gala - Auction Chairperson is Anna Danes. They promise you a great time when you join their committees! Sign-up at [www.santafemontessori.org](http://www.santafemontessori.org).

## SFMS Leaders

*"I like clay -you can make so many things with it!" Jacob, Rm 2*

### Board of Directors

President - Nancy Sager  
 Vice President & Grounds - Paul Sager  
 Finance & Facilities - Michael Akavan  
 Board Recruitment & Parent Involvement - Edna Gibson  
 Communication - Carol Higgins  
 Executive Performance - Cindy Jackson  
 Retention - Vicki Wolfrum  
 Recording Secretary - Teresita Leimer  
 Fundraising - James Barter

### Administration

Founder - Nancy Sager  
 Head of School - Walter Huebscher  
 Administrative Assistant - Conny Zijlstra  
 Business Manager - Christy Foley  
 Registrar - Jennifer Busick  
 Development Director - Karen Berger  
 Bookkeeper - Ana Aguila  
 Facilities Manager - Keith Perry

### Faculty

Christine Beausoleil  
 Zahra Sadeghi  
 Fibi Forutanpour  
 Beth Hagan  
 Cathy Zoeckler  
 Betsy Bowler  
 Cynthia Huebscher  
 Cindy Friedman  
 Ana Mora  
 Susan Bond  
 Corina Tellez  
 Carmen Gaxiola  
 Soraya Chowdhury  
 Doraly Quinonez  
 Sybylle Gibnau  
 Laurie Welch  
 Shahin Ahmadi  
 Lorri Lochow  
 Betty Houston  
 Michele de la Cruz

### Faculty (con't)

Maria Meyers  
 Lesley Koval  
 Alejandra Rosas  
 Bertha Verduzco  
 Shahla Dashtari