Austin Montessori School

Annual Report

2016-2017
The mission of Austin Montessori School is to guide the intellectual and character development of each child along a path towards his full and unknown potential. We strive to cultivate compassion and respect, independence and belonging, and freedom and self-discipline, in rich academic and social environments that are designed for each plane of development and honor the complementary needs of the individual and the group. We value an educational setting that is inclusive and responsive to the authentic nature of the child and reverent of the organic order of the universe.

Through parent and staff education, we work to develop a school and family culture that preserves and protects a healthy childhood. Our aim is to serve children possessing an ample range of temperaments and a variety of learning styles and rates. At the same time we seek to avoid labeling as pathological the normal range of children’s behaviors and differences in learning. We are dedicated to Montessori’s mission of world peace through human development.

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Gaines Creek Campus  
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Austin, Texas 78735  
512-892-0826

Sunset Trail/Jones Road Campus  
2904 & 2906 Jones Road  
4910-4912 & 5006-5016 Sunset Trail  
Austin, Texas 78745
This past year has brought us so much to remark upon—and made me more grateful than ever for the wisdom and compassion of our Beloved Community.

In his letter, our leader Grae Baker tells us of much of what has made the year remarkable within Austin Montessori School: the celebrated history, the satisfying current accomplishments, the inspiring future plans, and, even more, the members of our community—staff, parents, board, alumni, and the children, most especially the children.

Last year, as we lived and worked in a world grown more hostile and threatening, we saw more clearly than ever that our mission is not only essential but robust and enduring as well in its urgency of the moment in practical response to the daily needs of the Child, in its constancy of intention, in its continuing re-evaluation of present action, in its wise plans toward the future, and in its steadfast eye on service for Peace expressed through daily living, more necessary now than ever.

Never has the work of our Beloved Community served us better or been more essential to our well-being, the well-being of one another, and our children's well-being than over the past year. Never has living mindfully and with intention been more important to the coming years, as we strove to be in the world but not of the world.

We were challenged mightily and we held strong. We were called upon to endure bitter times in the world at large and we held firm in hope, love, and action within our community and our families. And look at all we accomplished!

These times may well continue or grow worse. But we are here. It is now. This is our Time. This is our Place. Regardless of the state of the world beyond our walls at home and at school, our work with our children is the same, as is our work with one another. We have embraced the sequences of shocks with grace and strength, accepted the fractures and filled their gaps with chosen responses in thought, word, and action. We have responded instead of reacting, keeping our hearts, minds, and spirits full of hope and love and keeping our home and school environments healthy for our children.

It is remarkable that we have persevered in choosing to live mindfully and with intention in our given space on earth and our time in history, in choosing hope and love over cynicism and contempt, and in fueling our action with a healthy anger free of hate and despair. And I am grateful!

With admiration and affection,

Donna Bryant Goertz
Dear Friends:

As I reflect on this past year, the 50th anniversary of Austin Montessori School, I’m filled with gratitude. Our entire community feels gratitude towards Donna Bryant Goertz, our school’s founder, and for the many years she spent developing and refining her practice, and carefully crafting a school-wide culture and approach solely devoted to the authentic developmental needs of children. I’m thankful for all of the staff and families that have lived and worked in community and partnership since our school’s founding in 1967. We are grateful for the leadership of Donna’s husband and longtime Executive Director of the school, Donald C. Goertz, Ph.D., who we sadly lost this year. We reflect fondly on the leadership and guidance of John R. Snyder, former Upper Elementary Guide, Elementary Coordinator, and Assistant Executive Director who succumbed this year to ALS after a long battle with the disease. Indeed the entire Montessori world has mourned the loss of these two gentlemen while celebrating each man’s contribution to the global Montessori community. Finally, we express heartfelt thanks for the years of service from Charlotte Kroger, former Children’s House Guide and Children’s House Level Mentor, who announced her retirement during the spring; she will be missed.

While we appropriately took time this year for reflection and celebration (more on that later), the AMS team continued its diligent work to improve our school and its operations. This year we established a business office for the school and hired a new Business Manager, Sandy Bartholome. Sandy joined our team in August and began working immediately with the administration and board to refine AMS’ budget and finance practices. We established a new All-Day/All-Year (ADAY) Montessori program for Children’s House in Magnolia Cottage on our Sunset Trail campus. The official start to this new, exciting program is the culmination of years of planning and preparation by many. A new parent education series – L.I.F.E. (Living, Including, Following, Experiencing) was established to further articulate and enhance our school/family partnership. The presentations in this series were developed by Donna Bryant Goertz and are foundational in our school’s approach to aiding developing children.

Our school continued its commitment to the professional development of our staff through our Montessori training sponsorship program. This year, Jessenia Giron, having just graduated from Primary training at the Montessori Institute of San Diego, took over as Guide for Pomegranate Cottage at our Great Northern campus as Valerie Pheasant transitioned to assume Guide responsibilities in our new ADAY program. Next door in Persimmon Cottage, we bid a fond farewell to Donna Mantich,
A middle school is added, Gaines Creek, and is led by Don Goertz.

Austin Montessori School becomes a non-profit school. A Board of Trustees is formed. Kate Hearne, Persimmon assistant, is completing her Montessori training at the Houston Montessori Institute in summer 2017 and will assume Guide responsibilities in the community. Similarly, Diana Day, former Casita and Birdsong assistant, is completing her elementary training at the Washington Montessori Institute and will be taking over as Guide in the Birdsong community where Elementary Coordinator, Joseph Aken, served as interim Guide for the community.

As 2016-2017 marked the school’s golden anniversary, our community spent time in reflection and celebration of our 50-year history. We had the fortunate opportunity to serve as a host school for the Association Montessori International’s annual Refresher Course in the United States. During the conference weekend, AMS hosted a celebration party for our Montessori colleagues on our Sunset Trail campus. Generations of Montessorians from across the world joined our current and former staff for an evening of tours, live music, food, drink, and cheer. And, of course, our 50th Anniversary Celebration and Auction Gala in April set records for tickets sold and funds raised for the school. Our Future Fund initiative at the end of the night shifted the focus of our anniversary celebration from reflecting on our history to creating our future. During this portion of the evening, the school unveiled its intentions of embarking on a long-range strategic plan during school year 2017-2018 to begin work on the Austin Montessori School of the future. The school has since tapped Ian Symmonds & Associates as a partner in this initiative.

Demonstrably from the numbers herein, our school is stronger than ever. We continue to build our cash reserves and are able to adequately fund our school’s operations across the board. We ended the 2016-2017 school year with an overall enrollment of 372, the highest in the school’s history – a trend we expect to continue. As we look towards the future of our school with intention and excitement, we remain steadfast in our commitment to our school’s mission; our partnership with our families; the professional development of our staff; and the needs of each child.

Grae Baker
Head of School
Our Community

**PARENT and INFANT COMMUNITY**
Ages 3 months - 3 years
25 Students

**YOUNGEST CHILDREN’S COMMUNITIES**
Ages 18 months - 3 years
Butterfly & Hummingbird Gardens
24 Students

**CHILDREN’S HOUSE COMMUNITIES**
Ages 3 - 6 years
Cypress, Laurel, Magnolia, Persimmon, Pomegranate & Redbud Cottages
160 Students

**EARLY ELEMENTARY COMMUNITIES**
Ages 6 - 9 years
Birdsong, Heartsong & Windsong
86 Students

**UPPER ELEMENTARY COMMUNITIES**
Ages 9 - 12 years
Nova & Terra
60 Students

**ADOLESCENT COMMUNITY**
Ages 12-15 years
Gaines Creek
42 Students

Administrative & Support Staff

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<tr>
<th>Position</th>
<th>Name</th>
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<tbody>
<tr>
<td>Founder/Director Emerita</td>
<td>Donna Bryant Goertz*</td>
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<tr>
<td>Director Emeritus</td>
<td>Donald C. Goertz</td>
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<tr>
<td>Head of School</td>
<td>Grae Baker*</td>
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<tr>
<td>Elementary Coordinator</td>
<td>Joseph Aken*</td>
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<td>Business Manager</td>
<td>Sandy Bartholome</td>
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<td>Librarian/Communications Coordinator</td>
<td>Sonal Bowness</td>
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<td>Director of Campus Operations - Great Northern</td>
<td>Amanda Brown</td>
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<td>Office Assistant</td>
<td>Robbie Burnett</td>
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<td>Shuttle/Bus Driver</td>
<td>Lucinda Castillo</td>
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<td>Custodian</td>
<td>Stefani Castillo</td>
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<td>Children’s House Mentor</td>
<td>Charlotte Kroger*</td>
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<td>Assistant to Director of Admissions</td>
<td>Cheryl McGee*</td>
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<td>Director of Operations</td>
<td>Dawn Michal</td>
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<td>Director of Admissions</td>
<td>Amber Miller</td>
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<td>Office Manager</td>
<td>Lois O’Brien</td>
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<tr>
<td>Consultant</td>
<td>Patricia Oriti*</td>
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<td>Maintenance Director</td>
<td>Jerry Pippins</td>
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<td>Early Arrival/South Campus Support</td>
<td>Johnna Shelton</td>
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<tr>
<td>Consultant</td>
<td>John Snyder*</td>
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<tr>
<td>Caretaker</td>
<td>Francesca Tejeda</td>
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<tr>
<td>Caretaker</td>
<td>Juan Tejeda</td>
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Classroom Guides & Assistants

**PARENT and INFANT COMMUNITY**
Erin Boardman
Parent Infant Education
Gwen Logan*
Parent Infant Education
Human Development
Instructor

**YOUNGEST CHILDREN’S COMMUNITIES**
Paije Long*
Margarita Ruiz*

**CHILDREN’S HOUSE COMMUNITIES**
Guides
Angela Eagle*
Jessenia Giron*
Jinny Gonzalez*
Donna Mantich*
Valerie Pheasant*
Priya Salem*
Elizabeth Suggs*

Assistants
Soccoro Aguilar
Mary Ann Collins
Laurel Gressett
Kate Heanne
Mariah Stewart
Matt Williams

Support
Yoli Bartholome
Alejandra Garcia

**EARLY ELEMENTARY COMMUNITIES**
Guides
Joseph Aken*
Erik Rivas-Rivas*
Jamie Stone*

Assistants
Mary Collins
Catherine Mason
Emily St. Amand-Poliakoff
Khara Vincent
Mick Westerman

**UPPER ELEMENTARY COMMUNITIES**
Guides
Libby Head*
Nicholas Pippins*

Assistants
Elena Covey
Kat Hartley

**ADOLESCENT COMMUNITIES**
Guides
Jesse Gevirtz*
Thomas Logan
Veronique Mareen
Kathryn Noack
Bill Sneed

*Has received an AMI diploma

*Initially classrooms were referred to by the guide’s name. In 2006, the school adopts the current community names.
Community Events

Here are just a few of the memorable community events that served to knit us together.

*The Great Northern Family Picnic* and the picnics and gatherings sponsored by the Parents Association, brought us together to celebrate milestones in the school calendar and to enjoy each other's company.

Families and staff loved working together at our *Outdoor Environment Days*, renewing and beautifying the gardens and play areas. Side by side we cared for the land that is our home.

*Bluegrass Night* at the Adolescent Community at Gaines Creek continued to be a hugely popular whole-family event, full of good food, fun activities, and entertainment, all hosted by the adolescents in our community.

*Fall Festival* brought us together for fun, fellowship, food and fundraising, as each classroom community sponsored an activity or cultural presentation.

*Theater Night* at the Adolescent Community was a truly entertaining event for the cast, crew and theater guests.

In addition to much-loved story times from guides and a presentation on Reading Aloud, the *Annual Book Drive* prompted the donation of over 240 new books for our libraries and classrooms.

Our annual *Town Hall Meeting* provided a closer look at the inner workings and financials of Austin Montessori School.
Our school community, past and present, came together to celebrate our **50th Anniversary Gala**. The auction was a record-breaking night to remember with dinner, dancing, celebration and fundraising totaling over $110,000 for our school.

We hosted a full slate of *Parent Education Events*, including Parent Gatherings and other meetings, a Parent Book Group, Parent/Infant Classes with Gwen Logan, many Coffees with Grae Baker and parenting courses and evenings with Carl Pickhardt, Karen Rayne and others!

Austin Montessori School hosted a **50th Anniversary Celebration** for colleagues attending the annual AMI Refresher Course here in Austin. Tributes to the history of the school and its founder, Donna Bryant Goertz, and former Executive Director, the late Donald C. Goertz, Ph.D., were spoken by Clara Serrano, AMS Board President, and Patricia Oriti, Montessori consultant and former Austin Montessori School staff member. It was a magical evening for all!

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- 2007
- **Community Events continued**

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- 2004 - Gaines Creek takes its first trip with full-cycle students to Rome, Italy.

- Fun Fact - What is now the library used to be a carport. Parents helped to enclose it sometime in the late 1970s or early 1980s.

- 2006 - The first year of "named" Communities.*

- 2012 - Magnolia Cottage begins with Elizabeth Howe as the guide.

- 2015 - The Austin Montessori School Parents Association is formalized; Brenda Hayosh is elected the first President.

- 2016 - The All Day/All Year Program begins.
The Board of Trustees, with the Head of School, maintains the financial stability of the school through a board-approved budget that ensures predictable revenue and well-managed expenses.

Revenue for the year ending July 2017 totaled $4.67 million, up from $4.2 million in the prior year. Operating expenses totaled $4.34 million, up from $3.95 million in the prior year, yielding a net income of $327,202. Non-operating expenses totaled $265,670, which included $91,366 in capital improvement expenditures and $174,304 in debt reduction.

For the last 5 years, the school has increased enrollment and planned for modest increases to cash reserves. Enrollment for the year was up 4.5% from the prior year, and as of July 2017 the average cash reserves remained at 3.5 months of operating expenses.

As a non-profit school, philanthropy continues to play an important role in our financial foundation. A strong Annual Fund and Spring Gala combine with a disciplined operating budget to help keep tuition affordable for our families.