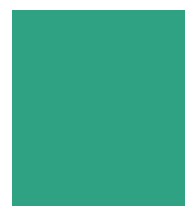
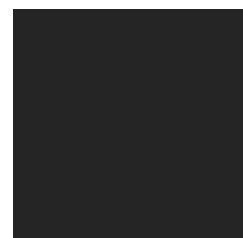
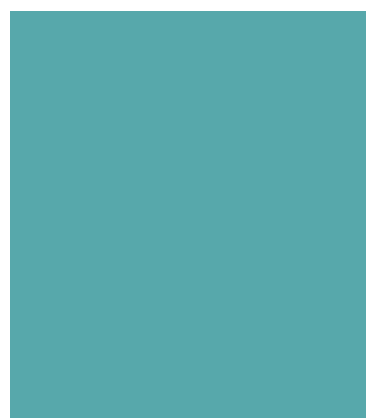


The Montessori School *of* Raleigh
ANNUAL REPORT
2021-2022



OUR MISSION

The Montessori School of Raleigh is the Triangle’s modern embodiment and mindful practice of the time-proven Montessori philosophy, developing agile thinkers, poised communicators, and gracious collaborators—engineers of authentic and fulfilling lives.

OUR VISION

In the year 2023, The Montessori School of Raleigh will be a thriving, well respected, and diverse day school community, recognized for its expertise in empowering students (toddler to 18 years) to be confident and competent life-long learners and respectful global citizens, distinct in the Triangle for delivering the authentic Montessori program and the International Baccalaureate program with unified purpose and integrity, competitive in attracting and retaining exemplary faculty and staff, and robustly funded by an ever-expanding circle of support.*

**Created and endorsed by MSR’s Faculty, Staff, and Board of Trustees, November 2018*



EARLY CHILDHOOD & LOWER SCHOOL

Lead Mine Campus
7005 Lead Mine Road | Raleigh, NC 27615

MIDDLE & UPPER SCHOOL

Brier Creek Campus
408 Andrews Chapel Road | Durham, NC 27703

919-848-1545 | 919-848-9611 fax
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PROFILE OF AN MSR STUDENT

At every developmental stage of the MSR experience, students are nurtured and guided to build foundational skills, independence, intellectual curiosity, and skill mastery. Through intentional classroom and curriculum design, in partnership with accredited Montessori and IB faculty, students are guided to grow as citizens, collaborators, and communicators. In short, the profile of an MSR student at any age is one of a child eager to learn, curious about themselves and their world, and poised for the next step of their own unique and exciting journey.

Thoughtful

Mistakes are welcome and build a foundation for deeper learning. Confidence, self-awareness, and intellectual curiosity are nurtured through repetition and skill mastery.

Vision

Learning environments that value diverse perspectives result in observant, thoughtful, and resilient citizens with a respect for an individual's unique contributions.

Compassionate

An emphasis on peace education, global citizenship, and cultural appreciation develops a sense of self and one's place in the world, building empathy, character, and cross-cultural understanding.

Hands-On

Sensorial materials and concrete objects enhance understanding of abstract concepts. Field trips, overnight excursions, and international travel immerse students in real-life learning experiences.



Collaborative

Peer-to-peer teaching and learning builds gracious collaborators, poised communicators, attentive leaders, and confident advocates for themselves and others.

Leg Up

Rigorous accreditation processes sustain MSR's highest educational standards. Expert teachers, skill mastery, self-directed learning, critical thinking, and intellectual curiosity all provide a leg up at every developmental level and prepare students for higher education and beyond.

Trailblazer

Challenging curricula, learning through mistakes, immersive experiences, and real-life learning opportunities develop confident, creative, independent thinkers and thoughtful leaders.

FROM THE HEAD OF SCHOOL



The Montessori School of Raleigh (MSR) accomplished many milestones during the 2021-2022 school year. On behalf of all of us who teach, lead, and learn at MSR, I would like to express our profound gratitude for your continued support of our students and teachers. Every member of the MSR community from faculty, parents, and alumni to administrators, trustees, and grandparents helped raise over \$230,000 in support of The MSR Annual Fund. Your

generosity strengthens MSR as an educational institution and, most importantly, enhances the student experience.

MSR's exceptional faculty have been the spirit and backbone of our success over the last two years. They have found ways to reimagine and create what effective teaching and learning look like in a pandemic. They have proven themselves to be adept at knowing each of their students and how to guide them to become the best version of themselves. As a parent of an MSR student, I personally witness this every day in the intellectual growth and confidence of my child. I rest well knowing not only is she being prepared for life by receiving an exceptional academic foundation, but that she is also being taught how to be a decent and thoughtful human being who has a keen awareness of self and of others.

Milestones in our educational program for the 2021-2022 school year include:

- 31% growth in enrollment from the start of FY21 to FY22;
- celebrating the graduation of the class of 2022 and the pursuit of their educational and professional goals;
- reinstating MSR's summer international travel program for Brier Creek students by way of a cultural studies experience in Spain;
- launching the Suzuki violin program for our Children's House students;
- revitalizing the Elementary music-theater program.

The 2022-2023 educational program looks to be just as exciting as last year's, as we:

- expand the Suzuki violin program into Grade 1;
- launch an Infant program;
- add a Children's House classroom and Lower Elementary classroom;
- resume overnight trips at the Elementary, Middle, and Upper School levels;
- launch a 1:1 laptop computer program for all Brier Creek students.

This past year, MSR employees had the opportunity to reflect upon the school's recent successes while thoughtfully imagining its future. As we embark on institutional strategic planning and the re-accreditation process for our International Baccalaureate (IB) Program during the 2022-2023 school year, we will look for ways to enhance the employee, student, and parent experiences.

"This past year, MSR employees had the opportunity to reflect upon the school's recent successes while thoughtfully imagining its future."

With these initiatives on the horizon, I am delighted that MSR parent Peter Kamarchik will be taking on the role of Board Chair at MSR for the 2022-2023 school year and will continue to lead our trustees, and MSR, toward a bright future. As a former Montessori student himself, he is a talented and

compassionate leader who knows the MSR community well. I look forward to working with Peter and all of our 2022-2023 trustees.

To everyone in the MSR community, thank you for making MSR a special place for our students. We are excited about the 2022-2023 school year!

With Gratitude,

Monica Rodriguez
Head of School



FROM THE CHAIR OF THE BOARD OF TRUSTEES



Dear MSR Community,

It is my pleasure to welcome all of you to another year full of learning, laughter, enrichment, and collaboration! Each school year gives all of us in the MSR community a new opportunity to embody and model all the values that animated Dr. Montessori's thoughts so long ago, and which our students, faculty, staff, and board seek to reflect.

commitment to consistent, iterative, positive changes by the school and by the Board of Trustees.

In continued partnership with our Head of School Monica Rodriguez, we look forward to watching our students grow during the current school year and putting the school on an ever-firmer foundation for the future.

Sincerely,

Peter Kamarchik
Chair, Board of Trustees

Building on the good work done and the generous support of our community as reflected in this Annual Report, the school is now embarking on a Strategic Planning initiative which will provide clear goals for the next few years and a path to achieving them. We will continue to support our faculty and staff so they may sustain the framework in which our children learn and thrive. There will be many opportunities for all of us to contribute to making the school the best it can be, whether in the present (volunteering for Garden Day is a personal favorite) or in the future (by cultivating long-term gifts and a sustainable base of capital).

We continue to enhance and broaden the programs available to our students on both campuses. Our focus on providing a broad and diverse range of educational experiences at a young age is highlighted by the expansion of the Suzuki violin program to our first grade students. Our commitment to provide access to learning technology for all our students can be seen in our 1:1 laptop program at the Brier Creek Campus. These and other programs demonstrate our

2021-2022 Board of Trustees

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WHY I GIVE

MSR FACULTY LEAD THROUGH GIVING

There are many reasons people choose to give to The MSR Annual Fund. Featured below are two MSR teachers who share why it is important for them to make MSR a philanthropic priority and contribute as members of the Leadership Giving Circle.

Cathy Bocklage (CB) has taught at MSR for 19 years as a Toddler Directress and serves as Parent Liaison manages the Parent Education Program (PEP). Cathy and her husband, Russ, have four children who have all attended MSR.

Rachel Martin (RM) has taught at MSR for five years as a Toddler Directress. Rachel and her husband, Garrett, have two children; both currently attend MSR.

MSR: Why was joining the Leadership Giving Circle important to you?

CB: As a long-term parent and staff member at MSR, my views on philanthropy have changed. I used to think that my tuition dollars (we have four children who have attended MSR) combined with my day-to-day contributions as a staff member were enough to fulfill any “obligation” I had to give. Upon further reflection and with more education about the Annual Fund, I realized that by becoming a member of the Leadership Giving Circle, our family has the opportunity to support MSR at a new and expanded level that makes a difference in the lives of our students.

The Leadership Giving Circle three-year pledge commitment is designed to have a lasting impact.

Our current year’s pledge fulfillment provides today’s most critical needs for students, staff, and families. The remaining two-year pledge commitment supports MSR’s plans for a robust and dynamic future and allows the school more opportunity to plan for the coming year’s needs.

RM: As a faculty member I feel I am well taken care of by MSR. I appreciate this and I wanted to give back to the school that has taken such good care of me and my family.

MSR: What would you say has been the biggest benefit of joining the Leadership Giving Circle?

CB: Taking the time to connect with other members of the MSR community to share stories of success and the difference Giving Circle gifts make for our students and our school. MSR is a dynamic community filled with talented and hardworking stakeholders who share a common mission. Being a part of the Leadership Giving Circle provides an opportunity for connection, reflection, and some fun celebrations!

RM: Knowing I am making a significant contribution to better the school for my classroom and for my own children!

MSR: As a teacher, you already give so much to MSR — what inspires you to give back even more through your philanthropic support at the Leadership Giving Circle level?

CB: It has been my privilege to be a member of this community for many years. While at MSR, I have grown as a parent and as an employee. MSR has invested in my family in a way that has changed the direction of our lives.

Our children are adults now and I can see the direct impact that our partnership with MSR has had on them—they are global citizens who love learning and are confident about their place in the world.

As a teacher it is an honor to partner with young children and their families to provide in some small

way what was gifted to us as parents. Being a member of the Leadership Giving Circle allows our family to contribute to MSR as we prepare, support, and educate today’s families in an ever-changing world.

RM: The team of faculty and staff that surrounds me each and every day is what motivates me to give back. I support The MSR Annual Fund through the Leadership Giving Circle to show my own support of our school and my colleagues so that I can continue to teach with and be a part of this faculty and staff community.

MSR: The MSR Annual Fund has seen steady growth recently. How have you seen this growth positively affect MSR?

CB: As a teacher, it is exciting to see the increased opportunity for professional development. These opportunities are critical to maintaining a dynamic and

“Giving to The MSR Annual Fund supports these and so many experiences that allow our children to flourish and be happy here at MSR.”



relevant educational approach as faculty and staff continue to work towards best practice at all levels of our community.

RM: I have seen many positive changes, but specifically our school is becoming more financially stable which improves the classrooms for each and every child enrolled in MSR.

MSR: Why should the MSR community continue to support the work of the school through The MSR Annual Fund?

CB: Gifts to The MSR Annual Fund directly impact the day-to-day educational experience of all MSR students and support the overall growth of the school. It allows for enhanced programing, necessary classroom upgrades, and professional development opportunities that in turn improve our students' educational experiences from Toddler-Grade 12.

RM: The MSR Annual Fund is helping improve our school for our teachers and our children and ultimately that's what we want: to work at the best school so we can witness each and every child grow, learn, develop, and become their own best self!

MSR: Why is MSR worthy of philanthropic support?

CB: I am incredibly proud of the work that is happening at MSR. MSR's commitment to excellence coupled with its thoughtful financial management and strategic planning places MSR in a very exciting position today and for the future. Supporting MSR's mission to "develop agile thinkers, poised communicators, and gracious collaborators" is a gift that truly can help change the world.

RM: I think it's simple: observe or talk to an MSR student! Toddlers smile at pick-up, Children's House students are proud of their lessons, elementary students have ownership of their work plans, Middle School students advocate for themselves and others, and Upper School students are admitted into their universities of choice. Giving to The MSR Annual Fund supports these and so many experiences that allow our children to flourish and be happy here at MSR.

MSR: How do you envision MSR growing with continued and increased philanthropic support?

CB: In my role as Parent Liaison, I would love to see expanded opportunities for parent education and connection to ensure MSR is more than simply a place to drop off your children for the day—we are a community.

As a teacher, it would be wonderful to see expanding experiential learning opportunities and opportunities to enhance our facilities and grounds for more "work of the hands" and nature studies for all ages!

RM: With increased support, gifts to The MSR Annual Fund will allow our teachers to have more support and materials to benefit every child's learning and growth!

No group has made a bigger impact on MSR's financial outlook than our Leadership Giving Circle. For more about becoming one of MSR's most transformational donors and helping to ensure MSR begins each year with the vital resources it needs, visit msr.org/leadership.

Toddler I Directress Cathy Bocklage works with children during a lesson using language materials.



YOUR GIFTS AT WORK

THE MSR ANNUAL FUND

The MSR Annual Fund helps to fill the 11% gap that exists between the school's annual operating expenses and tuition revenue. These funds must be spent during the year in which they are raised, so each school year brings new opportunities to advance the school and fulfill our mission through your generous support of The MSR Annual Fund.



Unrestricted gifts to The MSR Annual Fund are perhaps the most important MSR can receive. Not only do these gifts convey the trust of our donor community, they also provide resources for the school's greatest needs—needs that the school may not have been able to anticipate when building the annual budget.

Dr. Montessori's philosophy emphasizes hands-on learning and skill mastery using concrete objects to guide students in their understanding of abstract concepts. Repetition and free choice result in children returning to the manipulation of well-loved classroom materials in their learning. This year, through your generous gifts to Maria's Challenge Match on Day of Giving, **all 15 Montessori classrooms received \$500 towards the purchase of new Montessori materials.**



Being good stewards of our indoor and outdoor environments is a pillar of the Montessori and IB student experience. With a generous match from a MSR family, the MSR community raised enough funds on Day of Giving to install a **Certified Schoolyard Habitat Butterfly Garden on the Brier Creek Campus**. An extension of the Land & Livestock program, the butterfly garden is an expansion of how we care for our environment as well as an additional outdoor learning space for our Middle and Upper School students.



YOUR GIFTS AT WORK

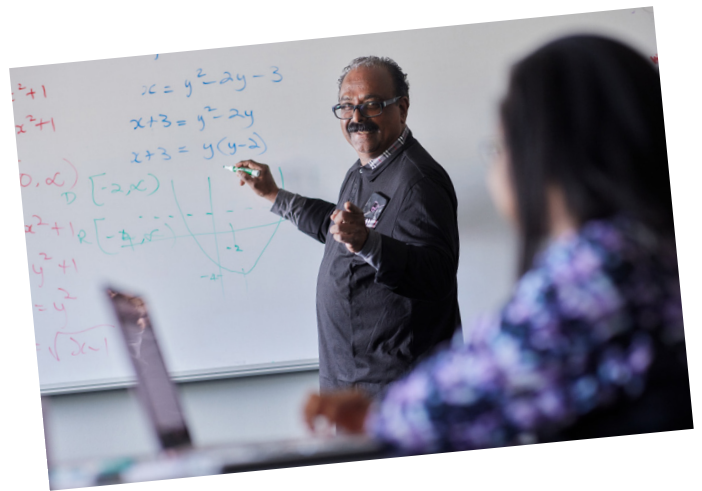
THE MSR ANNUAL FUND

The 2021-2022 school year offered many opportunities to support MSR and its most critical needs through The MSR Annual Fund. Through special days like Giving Tuesday and Day of Giving, membership in our multi-year Leadership Giving Circle, as well as gifts to the fund throughout the year, MSR put your gifts to work immediately to enhance teacher resources and student experiences on both the Lead Mine and Brier Creek campuses.



The health and safety of our students is MSR's number one priority. Your gifts provided **enhanced security measures** on our campuses such as added security cameras and support for our new Chief Operations Officer position.

Our teachers are our heroes at MSR and in 2021-2022, the MSR community raised **over \$23,000 in gifts to resource teacher professional development opportunities**. Through your gifts to The MSR Annual Fund and a generous \$5,000 match from our Montessori Parent Staff Association (MPSA) on Day of Giving, your gifts supported the high teaching standards by which MSR measures itself, supporting our teachers as they deepen their understanding, skills, and education for the benefit of our students and learning community.



Many times gifts to The MSR Annual Fund are needed to provide for some of our campuses' **every day needs**. Your gifts to The MSR Annual Fund have provided water bottle fillers, care for the chickens on the Middle School campus, ground coverings on our playgrounds, deferred maintenance, and more—all of which enhance the overall student experience.



2021-2022 VOLUNTEER LEADERSHIP

MPSA MISSION STATEMENT

The Montessori Parent Staff Association (MPSA) is MSR's joint parent and staff association, the mission of which is to provide a framework for organizing and coordinating parent volunteers, projects, and events that support MSR families, faculty, and staff, and strengthen the MSR community. All families enrolled at MSR and all faculty and staff are members of this joint association.

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Megan Baldwin

Heather Clark

Teacher Appreciation Week

Sarah Scott

Kate Thompson

2021-2022 ANNUAL FUND PARENT CHAIRS

The MSR Annual Fund Parent Chairs serve as leaders for parent giving participation and champion the The MSR Annual Fund and the important role it plays in the advancement of our school and its resources.

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HONOR ROLL OF DONORS

LEADERSHIP GIVING CIRCLE

The Montessori School of Raleigh is grateful for the members of MSR's Leadership Giving Circle who are among the school's most transformative donors. Through a three-year pledge commitment, this group of donors boldly contribute to the realization of the school's vision.

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THE MSR ANNUAL FUND

The MSR Annual Fund defines the reach and depth of a MSR education. The generosity of donors to The MSR Annual Fund sustains the unique learning tools, environments, and experiences that are the hallmarks of a Montessori and IB education, one rooted in real-life learning, cultivated through fostering transformative mindsets and the pursuit of success not bound by the traditional classroom.

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 Steven and Justine Walters
 Carol Whiteman
 Keith and Andrea Williams
 Mary Lou Woolard
 Rob and Catherine Wylie

CAPSTONE GIFTS

Capstone gifts are given by Upper School parents who make a one to four-year pledge commitment through the final years of their student's academic career at MSR, ensuring the strongest foundation for the most successful years leading up to graduation, higher education, and beyond.

Mason and Stephanie Deming

Frank Viscomi and Shirley Heiman

BEYOND THE MSR ANNUAL FUND: TRANSFORMATIONAL GIFTS TO THE MONTESSORI SCHOOL OF RALEIGH

Many thanks to the visionary donors who are embracing the vision of The Montessori School of Raleigh and propelling us into the future with their transformational capital gifts to the school above and beyond their commitment to The MSR Annual Fund.

Simon and Julie Allen
 Dale and Kristina Brunelle/Microsoft
 Grady and Holly Crumpler
 Abdel and Tori Darensburg
 Scott and Tammy Franklin
 Joe and Debbie Gordon
 Carmelo Gullotto and Jane Gagliardi

David and Kay Holloman
 Peter and Lisa Kamarchik
 Rob and Krystin Knox/Barings
 Timothy and Jennifer Kroboth
 Geoffrey and Anne Krouse
 Joe and Jessica Lee
 Mike and Kaley Mansour

Greg and Wendy Peele
 Jeremy and Meghan Pyle
 Gonza Salamanca and Derly Suarez
 Sheree Vaikus
 Dana and Shannon White

MONTESSORIANS ALUMNI GIVING CLUB

Montessorians are an ever-expanding group of MSR alumni whose leadership is exhibited by their commitment to the growth and future of The Montessori School of Raleigh. Through a five-year pledge commitment to The MSR Annual Fund, MSR alumni are supporting the vision and initiatives of The Montessori School of Raleigh.

Anonymous

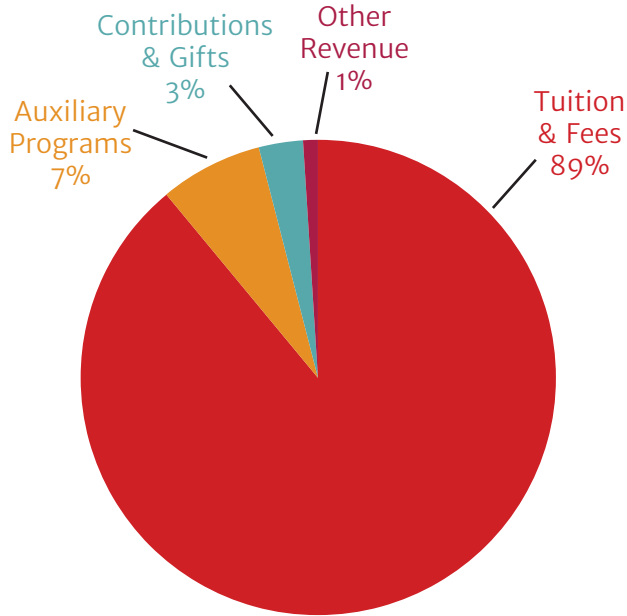
William Kelly '16

Laura Morrison '03

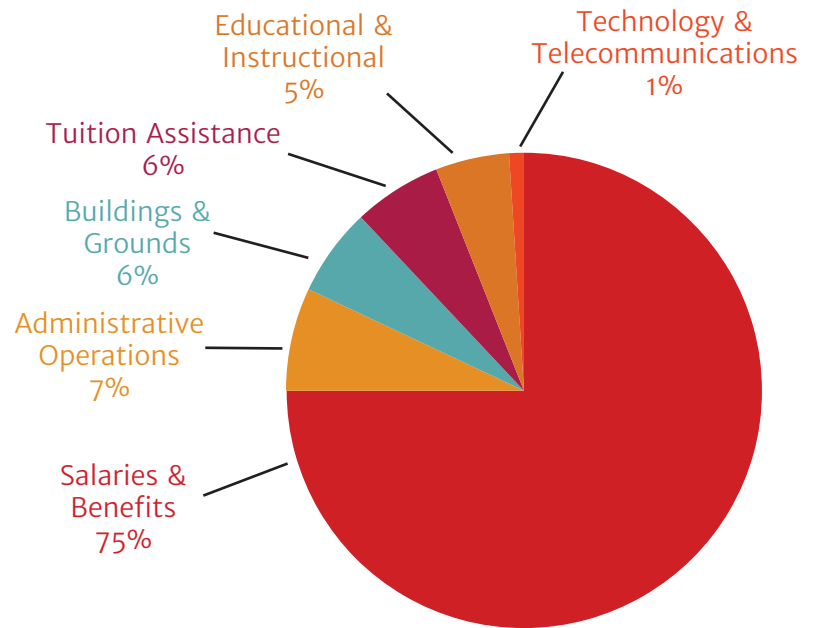
2021-2022 FINANCIAL OVERVIEW

At MSR, tuition covers 89% of our annual operating expenses. The MSR Annual Fund is a critical means of covering the gap in operational expenses while maintaining a tuition fee structure that remains accessible to families in the Triangle. MSR is committed to stewarding the resources our families have contributed to us, investing in our people, places, and potential.

REVENUES



EXPENSES





Expanding What is Possible: The MSR Annual Fund

Every year, The MSR Annual Fund provides critical resources that enable MSR to expand what is possible and realize our vision to equip students with an education that engages their minds, encourages exploration, inspires new passions, and builds confidence.

Annual funds provide physical resources such as health and safety equipment, beautiful and functional outdoor learning environments, technology, as well as funding for professional development, memberships, and accreditations. These foundational elements are necessary to deliver an exceptional Montessori and IB education.

Your commitment and loyalty to MSR as expressed through your giving yields exponential benefits. Thank you for choosing to support our time-proven Montessori learning philosophy, our deeply dedicated MSR faculty, and the values we share as a community. Your generosity allows MSR to continue guiding students on their journey to becoming thoughtful, purposeful, and contributing citizens in our world.

It is never too late to support The Montessori School of Raleigh. Please consider giving a gift to this year's MSR Annual Fund.



WAYS TO GIVE

For all the ways you can give, or to give today, please visit msr.org/giving or scan the QR code:



CHECKS MAY BE MADE PAYABLE TO:

The Montessori School of Raleigh
7005 Lead Mine Road
Raleigh, NC 27615

Please note "MSR Annual Fund" in the memo.

FOR QUESTIONS ABOUT GIVING, PLEASE CONTACT:

Ellie Cooke
Director of Development
ecooke@msr.org
(919) 848-1545 x 287

The Montessori School *of* Raleigh

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