



2024-2025 Annual Report

Contact Information

Sunstone Montessori School

Woodstock Campus
Toddler, Primary, Elementary
5235 SE Woodstock Blvd
Portland, Oregon 97206

Milwaukie Campus
Toddler, Middle School
13515A SE Rusk Rd
Milwaukie, Oregon 97222

503 - 768 - 3847
www.sunstonemontessori.org





“Imagination does not become great until human beings, given the courage and the strength, use it to create.” –Maria Montessori





“Our care of the child should be governed, not by the desire to make him learn things, but by the endeavor always to keep burning within him that light which is called intelligence.” –Maria Montessori



Dear Sunstone Families, Friends, and Community Members,

As we reflect on another remarkable year at Sunstone Montessori School, our hearts are filled with gratitude and pride. Sunstone is more than a school—it is a vibrant, supportive community built on the dedication and generosity of extraordinary people: our curious and capable students; our passionate and talented Guides, Assistants, and Support Staff; and you—our families, friends, and supporters—who make all of this possible. Together, we continue to create an environment where children truly flourish.

This past year has been one of growth, achievement, and joyful connections. We realized a long-held dream with the launch of our own Middle School program on a beautiful 12-acre campus! Alongside this exciting milestone, we also opened two new Toddler Programs, welcoming twenty-four children ages 16 months to 3 years.

Throughout the year, we celebrated countless moments that brought our community together—Fall Community Day at the new Milwaukie campus, Parent Education Nights, Back to School Night, Children’s House Parent-Child Sharing, the Gala & Auction, the Lupine theater production, and a truly memorable graduation. We also introduced a wonderful new fall tradition—the Read-A-Thon. Each of these experiences reflects the strength of our community and the deep joy that comes from learning, growing, and celebrating together.

We also welcomed new members to the Sunstone team, expanding our ability to serve students with warmth, expertise, and care. With ten vibrant classrooms now serving children from 16 months to 14 years old and a dedicated staff of approximately 48 members, we are proud to report strong interest from families throughout Southeast Portland, Milwaukie, and beyond. Our enrollment of 185 students keeps us right on target and thriving.

None of this would have been possible without your support. Every contribution—whether of time, talent, or financial gifts—directly enriches the

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“Never help a child with a task at which he feels he can succeed.”

—Maria Montessori



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experiences and opportunities we offer our students. As we celebrate all we've accomplished together, we also look ahead with optimism and shared purpose, confident that together we will continue to shape a bright and inspiring future for Sunstone.

Thank you for being an essential part of our community. Your generosity, dedication, and belief in our mission fuel everything we do, and we are deeply grateful.

With appreciation and excitement for what lies ahead,

Cathy Elliott
Head of School
Sunstone Montessori School



2024-2025 Board of Trustees

Sunstone Montessori School is a non-profit, 501(c)(3) educational organization, governed by a Board of Trustees.

President	Angel Willard	<i>Friend of SMS</i>
Vice President	Kelly Sherbo	<i>Current SMS parent</i>
Treasurer	Patrick Magee	<i>Friend of SMS</i>
Secretary	Jonathan Anderson	<i>Alumni SMS Parent</i>
Head of School & AMI Representative	Cathy Elliott	<i>Alumni SMS Parent</i>
Trustee & AMI Representative	Lynn Rossing	<i>Friend of SMS</i>
Trustee	Katy Rustvold	<i>Alumni SMS Parent</i>
Trustee	Andy Wood	<i>Alumni SMS Parent</i>
Trustee	Radek Paces	<i>Current SMS parent</i>

Our Vision:

Our vision is a community of intellectually curious, independent, and compassionate lifelong learners.

Our Mission:

Sunstone Montessori School develops the whole child by providing an academically strong, emotionally nurturing, and socially supportive environment in accordance with AMI guidelines for Montessori education.

Commitment to Diversity:

Sunstone Montessori School welcomes students and staff of any race, veteran status, sexual orientation, gender identity, color, nationality and ethnicity, religion, and family constellation to all programs and activities at the school. The school does not discriminate in its educational, hiring, admission, or school-administered policies. It is our goal that Sunstone Montessori School reflects the rich diversity of our community, including varied cultures, economic status, and individual and diverse educational needs.





Program Update

This year, Sunstone Montessori School continued to grow and flourish, offering a high-quality Montessori education that nurtures the hearts, minds, and spirits of our students. Across our two campuses, we served 201 children—from our youngest toddlers at 16 months to our Middle School students at 12-14 years of age—each child supported in an environment carefully prepared for exploration, independence, and joy in learning.

A Vibrant and Connected Community

At our Woodstock campus, we are home to one Toddler community, three Children’s House classrooms, two Lower Elementary classrooms, and one Upper Elementary classroom. Our new Milwaukie campus houses two Toddler communities and one Middle School. The presence of multiple age groups on campus creates a rich and dynamic community. Older students naturally serve as role models and helpers for younger ones—offering a hand on the playground, joining in shared community

activities, and engaging in meaningful peer learning. These daily interactions embody the Montessori philosophy of mixed-age learning, fostering empathy, confidence, and leadership in every child.

Our learning continues year-round with summer programs for Toddler, Children’s House, and Elementary students, ensuring that children can stay connected, curious, and engaged even beyond the academic calendar.



Enrichment and Learning Beyond the Classroom

Spanish Enrichment is woven throughout every classroom, led by our dedicated Spanish teacher who integrates language and culture through developmentally appropriate lessons, songs, stories, and activities. This approach allows children to experience Spanish as a natural and joyful part of their everyday learning.

Our commercial kitchen brings another dimension of community and care to daily life at Sunstone. Under the skilled guidance of our chef, Matt Howard, and his assistant, Molly Shaw, we offer fresh, made-from-scratch meals that nourish both body and spirit. Every school day, our kitchen team prepares wholesome snacks for the Toddler, Children’s House, and Aftercare programs, as well as nutritious lunches for our Toddler, Children’s House, and Elementary students. Menus feature a diverse range of culinary traditions and include meat, vegan, and dairy-free options, all crafted from fresh, seasonal ingredients. The shared meals provide not only nourishment but also a sense of togetherness and gratitude.

Our after-school enrichment program invites children to explore new interests and skills through offerings such as yoga, chess, and robotics—a blend of movement, strategy, and innovation that complements their Montessori learning experience.



Growth at Our Milwaukie Campus

We are thrilled to have expanded our reach and vision with the development of our new Milwaukie campus, a picturesque 12-acre property located just 4.5 miles south of Woodstock. Designed with intention and care, this campus is home to two Toddler classrooms and a Middle School modeled after Maria Montessori’s Farm School concept—where students engage deeply with the natural world through work that cultivates both knowledge and stewardship. Campus tours and enrollment began in the fall of 2023, and we proudly opened our doors in September 2024.

Dedicated and Accomplished Faculty

At the heart of Sunstone’s strength is our exceptional faculty—highly accomplished professionals who bring depth and passion to their work. Their expertise spans diverse fields including ecology, food systems, environmental ethics, foreign language, music, and art, enriching the learning experience across all levels. As an AMI-accredited school, we uphold the highest standards of Montessori education through our commitment to employing AMI-trained guides and investing in ongoing professional development.

Together, these programs, people, and places create a vibrant ecosystem of learning—where children are guided with respect, curiosity is nurtured, and community is continually strengthened. Each year, we grow not only in numbers and spaces, but in purpose and connection, carrying forward the Sunstone mission to inspire capable, compassionate, and confident lifelong learners.



"Establishing lasting peace is the work of education". –Maria Montessori



Campus Facilities Update

This year brought tremendous growth and transformation to our Milwaukee campus—renewing our spaces and expanding the opportunities we offer to our students, families, and staff. These updates reflect our continued commitment to creating environments that inspire curiosity, nurture independence, and strengthen community connections.

Middle School Transformation

The Middle School building received a full remodel, revitalizing its learning spaces and expanding its possibilities. The project included renovating classroom space, installing a computer lab, a workshop space, two offices, and updated bathrooms. One of the most exciting additions was the installation of a commercial-grade kitchen, allowing students to prepare communal lunches and host meals for the broader community—a hands-on extension of their learning and leadership. Fresh interior and exterior paint completed the transformation, giving the building a bright, welcoming presence that matches the energy within.

Toddler Classrooms and Outdoor Play Space

Two new classrooms were designed and remodeled specifically for our youngest learners, offering warm, thoughtfully prepared environments where curiosity and independence can flourish. Each classroom features new flooring, lighting, and paint, along with added windows and glass doors for natural light and accessibility. Each classroom includes a child-sized bathroom and sinks, work/prep counters, and storage—all crafted to support the developmental needs of toddlers. The classrooms were fully equipped with beautiful, functional Montessori materials and furniture. Outdoors, a new enclosed play area was created to provide a safe and engaging space for toddlers to enjoy the fresh air when they are not exploring the beauty and nature among the 12-acres of woodlands, fields, and pond.

Staff and Community Space

We remodeled a separate space to serve as both a staff space—complete with a kitchen, laundry, break room, and bathroom—and a classroom for our “Montessori Beginnings” program. This new program is a welcoming outreach initiative that offers resources, learning, and connection for families with babies, helping to nurture the earliest stages of growth and community engagement.

Middle School Agriculture and Animal Care

In a creative and hands-on expansion of their work study, Middle School students designed and built a goat habitat, welcoming six goats to campus and learning how to care for them as part of their daily routines. Alongside this, they constructed and cultivated new garden beds, growing vegetables, flowers, and pumpkins—experiencing firsthand the joy and responsibility of tending to living things and sustaining their environment.

These updates have not only enriched our physical campus but also deepened the connections between learning, community, and care that define our school. By investing in thoughtful, purpose-driven spaces, we continue to shape an environment where children can thrive, families feel supported, and education is lived every day. Together, we’re building more than classrooms—we’re building community, creativity, and a shared vision for the future.





“Character formation cannot be taught. It comes from experience and not from explanation.” –Maria Montessori



Financial Aid and Tuition Discounts

Philanthropy and Financial Aid

We are deeply grateful for the generosity of our parents, grandparents, alumni, board members, and staff, whose philanthropic contributions strengthen every corner of our community. These gifts play a vital role in supporting the day-to-day life of our school. They help fund professional development, educational and classroom materials, and financial aid, while also helping to build Sunstone’s long-term financial stability through savings and reserves.

At Sunstone Montessori School, financial aid is more than a program—it is a reflection of our values. We believe that access to a Montessori education should not be limited by financial circumstances. Every year, we thoughtfully and confidentially review requests for assistance with the goal of making a Sunstone education possible for as many families as we can.



In the 2024–25 school year, 4% of our operating budget was dedicated to financial aid and tuition discounts, supporting 33 students in continuing their Montessori journey.

Through this shared commitment to generosity and inclusion, our community strives to be a place where all children, regardless of financial background, can learn, grow, and thrive. Together, we are cultivating a culture of care, equity, and opportunity that reflects the very heart of our mission.

Fundraising

What an inspiring year of generosity and community spirit! We are filled with gratitude for everyone who supported Sunstone Montessori School's fundraising efforts during the 2024–25 school year. Together, our community raised an impressive \$267,000 through a variety of initiatives—including our Annual Auction and Gala, the Annual Fund Appeal, corporate matching gifts, Giving Tuesday, True Tuition, our first Readathon, as well as in-kind donations and grants.

This remarkable success reflects the deep commitment of our community: 58% of families contributed a gift to the school, and MANY more extended family and friends did the same. 50% of our staff and 100% of our board joined in giving as well. Such broad participation demonstrates the shared belief in Sunstone's mission and the collective investment in the future of our children.

Fundraising plays a vital role in our school's ability to thrive. Because tuition alone does not fully cover operational expenses, these funds help to bridge the gap—supporting essential needs such as classroom and educational materials, professional development for staff, and our financial aid program.

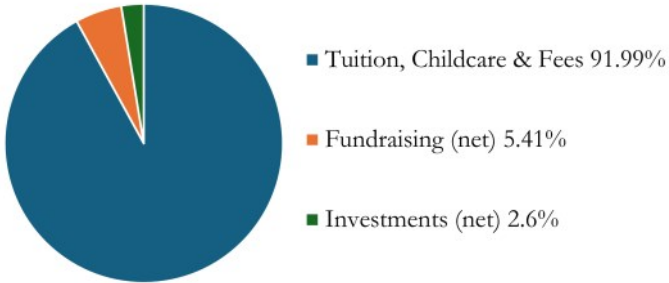
We extend heartfelt thanks to our parents, relatives, alumni, community partners, board members, and staff for their continued generosity. Each contribution—whether financial, in-kind, or through volunteer support—strengthens the foundation on which Sunstone continues to grow.

As we look ahead, we remain committed to fostering a culture of philanthropy that deepens our relationships, sustains our mission, and ensures that every child at Sunstone has the opportunity to learn, explore, and flourish.

Financial Results

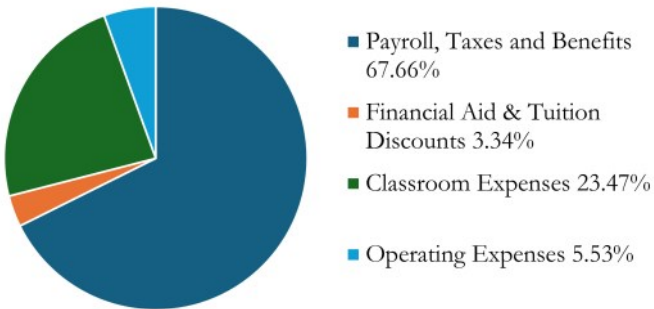
Income

Tuition, Childcare & Fees	\$3,790,000	91.99%
Fundraising (net)	\$223,000	5.41%
Investments (net)	\$107,000	2.60%
Total	<u><u>\$4,120,000</u></u>	100%



Expenses

Payroll, Taxes and Benefits	\$ 2,592,000	67.66%
Financial Aid & Tuition Discounts	128,000	3.34%
Classroom Expenses	899,000	23.47%
Operating Expenses	212,000	5.53%
Total	<u><u>\$3,831,000</u></u>	100%



The unaudited Financial Results summarized above are preliminary as of the publishing of this report and will be reviewed by our independent accountant.

2024-2025 List of Donors

\$15,000 and above

Christine and Benny Lazo
Eva and Alex Osborne
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\$5,000-\$14,999

Nancy and Alfred Osborne
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Temple Linder
Cindy and Chuck Ng
Matthew and Molly Parker
Megan Schrader and Thomas Baker
Owen Solberg and Juniper Harrower
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\$2,500-\$4,999

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Glenda and Wade Pederson
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\$1,000-\$2,499

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*Kees and Kirsten Cook
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Shoshana Maxwell
Sara Merriman and Stephen Bardwell
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Shawna and Colin Williams



\$100-\$499

Lyza and Jonathan Anderson
 Antonio Andrade
 Noah Andrade
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 Candice Bosworth-Bray and Jason Bray
 Deanna Bredthauer
 Terra Cloyes-Hinojos and Paul Hinojos
 *Jennifer Cunliffe and Matt Whorton
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 Cindy Tuinstra
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 Blair and Chris Zerfas
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\$1-\$99

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 Ashlyn Carlini
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Novartis
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Donors with an * next to their names utilized their employer's matching gift program.

Sunstone Montessori School is grateful for all charitable donations. We make every attempt to recognize and thank each and every donor. We apologize for any that may be missing or listed incorrectly on this list.



"The child has a mind able to absorb knowledge. He has the power to teach himself." –Maria Montessori





“Education should no longer be mostly imparting knowledge, but must take a new path, seeking the release of human potentials.” –Maria Montessori





Commitment to Diversity

Sunstone Montessori School welcomes students and staff of any race, disability, veteran status, sexual orientation, gender identity, color, nationality and ethnicity, religion, and family constellation to all programs and activities at the school. The school does not discriminate in its educational, hiring, admission, or school-administered policies. It is our goal that Sunstone Montessori School reflects the rich diversity of our community, including varied cultures, economic status, and individual or special educational needs.
