



Little Oak

MONTESSORI SCHOOL

Inspiring a lifetime love of learning

Annual Report
Fiscal Year August 2021-July 2022





Mission

Little Oak Montessori School supports the development of the whole child by providing a comprehensive Montessori education to children of the Columbia River Gorge.



As a community, we share a common vision to embrace child-centered education and partner with parents in developing capable and confident human beings connected with their inner voice. This means developing the whole child intellectually as well as morally, emotionally, socially, spiritually, and behaviorally in preparation for all life may hold.

Contact Information:

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PO Box 530
White Salmon, WA 98672
509-281-1721
admin@littleoakmontessori.com
www.littleoakmontessori.com

Our Values

Joy of Learning

We provide engaging and purposeful learning opportunities to inspire a lifetime love of learning.

Independence

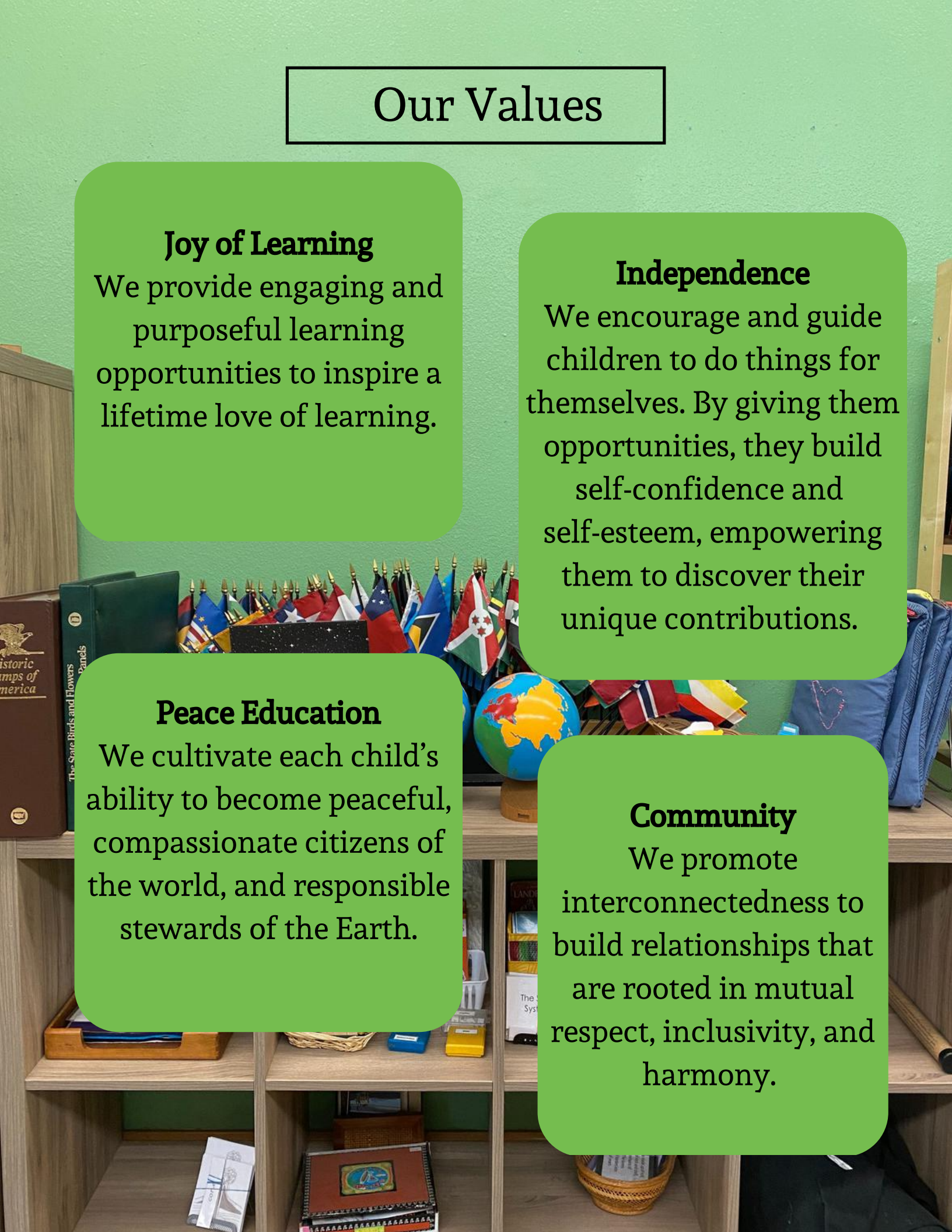
We encourage and guide children to do things for themselves. By giving them opportunities, they build self-confidence and self-esteem, empowering them to discover their unique contributions.

Peace Education

We cultivate each child's ability to become peaceful, compassionate citizens of the world, and responsible stewards of the Earth.

Community

We promote interconnectedness to build relationships that are rooted in mutual respect, inclusivity, and harmony.



2021-2022 Program Staffing & Enrollment

Children's House: 41 students

Dragonfly Room: 21 students
Hannah McCulloch, Lead Guide
Brittany Bernard, Assistant Guide (Part Time)
Kaylee Baker, Assistant Guide (Part Time)

Hummingbird Room: 20 students
Jil Parrish, Lead Guide
Athena Frost, Assistant Guide (Part Time)
Camille Bush, Assistant Guide (Part Time)
Abby Young, Assistant Guide (Part Time)

Elementary Campus: 33 students

Kathryn Eagan, Lead Guide
Siena Ballance, Assistant Guide
Jenna Anderson, Assistant Guide
Julia Bartos, Assistant Guide

After School Program: Children's House
Kaylee Baker, ASP Coordinator

Administration
Carmen Brown, Office Coordinator
Kristina Cronkright, Admissions Coordinator
Lindee Lewit, Head of School



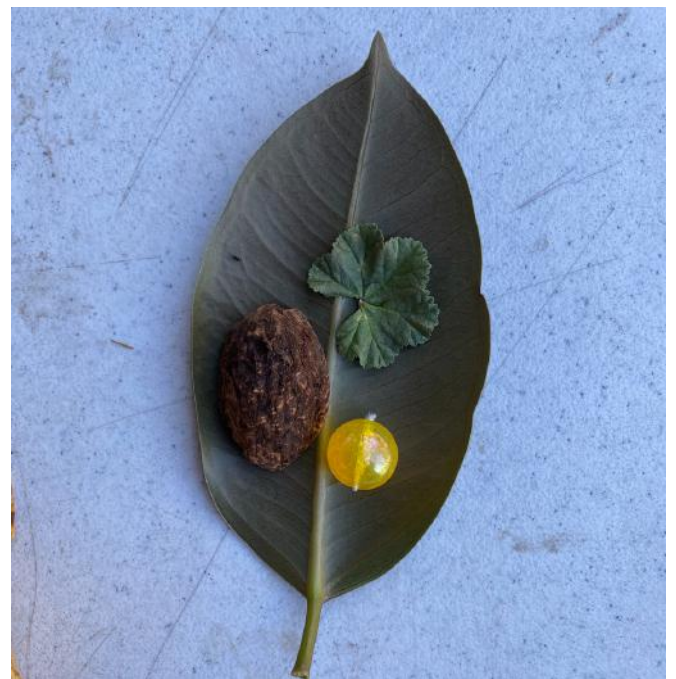
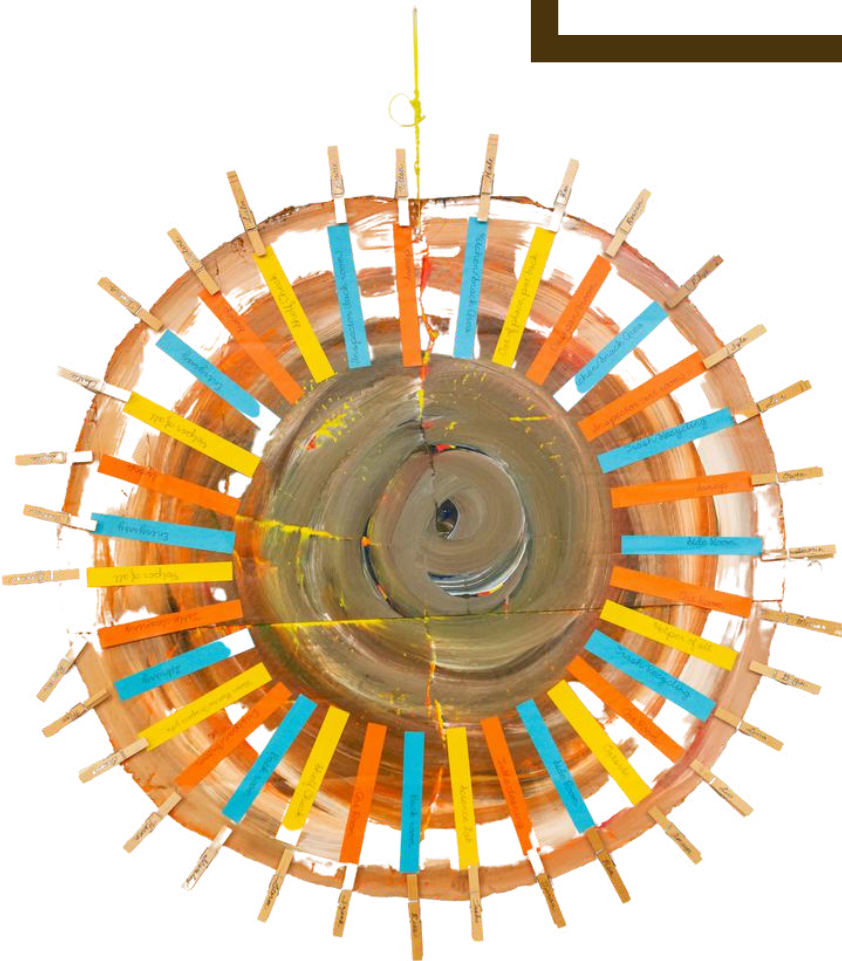


Persevering Through the Pandemic

At the onset of the Covid-19 pandemic, Little Oak Montessori School stepped into the difficult position of navigating ever-changing issues over the course of several years. There were many layers of complexity involved in finding safe and creative ways to keep Little Oak open while also providing high quality Montessori education. Protocols put in place early in the pandemic by our tireless Head of School were not only integral to keeping Little Oak open to in-person learning, but also became a local example of how to manage state health protocols. The adaptability, flexibility, and seamless implementation of safety protocols ensured there was never a major COVID outbreak and resulting school closure due to contagion. Little Oak hosted weekly health department school meetings for Klickitat County. Little Oak also enrolled signed up at the beginning of the 2021 school year to join the Test to Stay health protocol whereby children exposed to Covid-19 who continued to test negative after exposure could continue attending school, rather than quarantining an entire classroom. The safety of our community and was taken seriously and minimal disruption to learning was also prioritized. Throughout the last two years, Little Oak continually demonstrated adaptability, resilience, excellent communication, and execution of crucial and strategic procedures.

re·sil·ience

the capacity to recover from difficulties; grit



2021-2022 Board of Directors

Little Oak Montessori School is a non-profit,
501(c)(3) educational organization,
governed by a Board of Directors:



Rachel Montague, Board President

Beatriz Acosta, Treasurer

Mendy Maccabee, Secretary (through Jan 2022)

Kristin Franger

Sam Grimm

Eileen Brady (joined Feb 2022)

Kipp Baratoff (joined Feb 2022)

Haley Harkema (through Dec 2021)

Lindee Lewit, Head of School



Message from the Head of School:

Dear Little Oak Community,

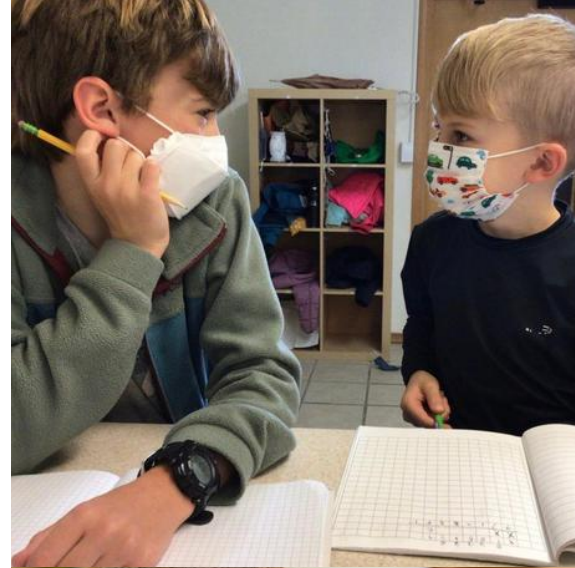
In August of 2019, I stepped into the position of Head of School for Little Oak Montessori. Since that time, I have grown and become a better learner, teacher, and leader through the contributions of others. This past 2021-2022 school year is marked in my memory by the outpouring of support and guidance of staff, board members, and parents who worked hand in hand to uphold and reimagine how Little Oak can thrive in the face of the pandemic. Our graduation ceremony and end of the year picnic held last June reminds me of our deep connection with each other and the ways in which our students, staff, and families bring our mission to life each and every day.

Little Oak is defined by our humble beginnings, past stories, and future potential. This Annual Report highlights the courage and creativity that the Little Oak community experienced last year. Upon reflection, there is an essential truth that has remained present from my very first days in the Little Oak Community. Relationships, connections, and flexibility are essential. Connections to the broader world through a lens of peace, diversity, equity, and justice will remain crucial facets of a Little Oak education. Montessori education has led the way for generations of independent learners, and the emphasis on learning to give back to humanity and the earth. Our learning community prioritizes empowerment, deep engagement, and accountability with our work and I have seen our community deeply engaged in whatever the challenge may be. It's inspiring to see!

I am so grateful to the Little Oak community past and present for shaping the school we are today. I am also thankful for all of the students and their guides who undertake each day to create habits, skills, and ideals that will genuinely last a lifetime. Read on to nurture pride within yourself for being a part of the Little Oak community.

Lindee Lewit

Lindee Lewit
Head of School





Message from the Board President



Dear Little Oak Community,

This annual reflection allows us to celebrate the unique and special learning that happens within Little Oak's community and this year we do so against the backdrop of a world that demands the kind of inquisitive, empowered, and creative problem-solving minds that Little Oak is committed to nurturing. The collective good work, on behalf of the children we serve, is evident on a daily basis throughout our school. Parents and caregivers, staff, board members, volunteers, and donors continually commit and engage for the betterment of our community. As a school, we are committed to our mission to offer high quality Montessori education from preschool through elementary grades in the Columbia Gorge. We are also committed to strong ethical and active governance and leadership, transparency in sharing important information with the community, and active, thoughtful planning as we work toward strategic goals for the long-term health of Little Oak. Our aim in this report is to provide insight into our strategic advances and share the conscientious fiscal oversight of our organization.

Persevering Through the Pandemic

Last academic year (2021-2022), we saw the continued impact of the Covid-19 pandemic on our community and world. What is remarkable is that under the guidance of our dedicated and capable Head of School, Little Oak was able to really persevere. Back in 2020, we applied for and received Paycheck Protection Program (PPP) funds that were employed to pay and retain our staff. This funding was forgiven in 2021. In addition, Little Oak was also able to receive an Economic Injury Disaster Loan (EIDL) to help our school recover from the impact of the pandemic. This loan offers a cushion of \$160,000 and a means to deploy low-interest funds should the need arise. Little Oak developed a strong relationship with the Klickitat Health Department and local school district nurses. We were able to enroll in a Test to Stay program to ensure the least amount of school disruption for students who were sick or exposed to the virus. Little Oak was able to not only stay open and safe throughout the *entire* pandemic but was able to steer efforts to maintain and build our community, increase demands for enrollment, and attract and hire strong guides for our classrooms.

Steady Financial Health

It is a pleasure to report that for the second year in a row, Little Oak Montessori has effectively planned and managed budgets such that we have ended the year with a net positive operating surplus. We are growing our operating reserves and are working to strategically deploy these funds to invest in growth. We are especially proud to report that last year the school board was able to increase staff pay and additional benefits at a rate above typical inflation, highly competitive within nation-wide Montessori wages, and to be able to compete with local area public school salaries.

We currently offer life insurance, retirement planning, medical reimbursement plan, and the addition of enrichment activities taught by specialists so our teaching staff has built-in planning time. We recruited two new lead guides from out of state to join our faculty and retained several key talented guides and assistant guides who round out our faculty. We are looking forward to doing more to attract and retain our talented staff as we look forward with anticipation that the demand for Little Oak continues to strengthen. We also hired a Professional Employer Organization (PEO) to manage benefits and payroll, allowing our Head of School to focus on administration, operations, fundraising, and personal connections that she does so well. We are allocating money on growth initiatives to prepare to launch a capital campaign. It is the Board's hope that all of these areas – student scholarships, staff benefits, strategic spending – will continue to increase with each successful year.

Preparing for Future Growth

As a board, we have spent much of the 2021-2022 year focusing on the long-term future for Little Oak. We have been working hard to ensure that our beloved school has a solid foundation to serve the Columbia Gorge community for years to come. We hired Rose City Philanthropy to train our board members on how to strengthen our philanthropic base and prepare for a campaign to grow our school and combine to a single campus. For the third year in a row, our retention rate for students advancing from Kindergarten to Elementary was over 90% and our waiting list has grown beyond 50 children.

The board voted to split the elementary into two distinct classrooms and hire two lead guides to meet the growing demand as matriculation from children's house to elementary continues to remain very high. We will soon be looking for a site so that we can combine our classrooms and administration onto a single campus. We are exploring the options to raise the funds to meet this long term vision. The amount of behind the scenes work that has already been done is astounding, and I want to thank our amazing board members for volunteering their expertise, time, and commitment to engage in these strategic plans. Little Oak continues to strengthen and cultivate fundraising efforts, enlist volunteers, and create positive relationships with donors and alumni and these tasks will continue to grow as the campaign takes off. With that said, the Board would like to request anyone with knowledge or expertise in real estate, property development, commercial financing or investment to assist in this endeavor.

Little Oak Board of Directors continues to prioritize the recruitment and retention of high quality Montessori educators and administrative staff. In setting the budget for the 2022-2023 school year, the board was able to competitively increase staff pay and benefits, while only raising tuition 3% in the midst of historic inflation, below the increases of most regional independent schools.

Tuition Assistance is Strong

Little Oak continues to prioritize increasing access for all families interested in Montessori education in the form of financial aid. During 2021-2022 we were able to increase our financial aid offering from a range of 10-50% assistance to a full 50% assistance for all families who applied through the FACTS tuition assistance program. We currently support 10% of our students' tuition. Our annual Gala supports our financial aid. We are looking forward to continuing to expand our financial aid program so thank you for contributing to this important fund.

Speaking of fundraising, in the time of a pandemic, global financial instability, and social distancing, Little Oak sought family-friendly, inclusive, and low-key events to safely gather and raise funds. We were able to fundraise through the Fall Fair raffle and Halloween parking lot parade, Tuesday giving, and our Annual Gala – the Night at the Movies, which was a family-friendly all-inclusive event. From these fundraising events and campaigns, Little Oak raised \$39,815 in the 2021-2022 school year. This year we will be raising the bar. We are looking forward to more than doubling our fundraising efforts this coming year. Stay tuned for a return of our live auction Masquerade Ball themed Gala on April 15th, 2023! The Parent-Teacher Organization and Gala committee have been working hard to plan for our huge fundraising goals!

Establishing Social Justice Committee

On par with the Association of Montessori Internationale (AMI) guidelines, Little Oak has taken significant steps to prioritize social justice efforts in our school. A committee of parents, teachers, and outside consultants was formed in 2021. Together, they are thoughtfully developing a Justice, Equity, Diversity and Inclusion statement for our school. The staff and school board have completed training on school-based social justice work, and we had a whole-school parent education night where visiting human rights and social justice advisor from AMI, Sheri Bishop, M.Ed, guided us through our efforts moving forward at Little Oak.

There have been many Little Oak Boards that have volunteered so much time to develop and create a wonderful educational experience for the children who have attended our school. I am so proud that we have professionals who have led us through difficult and challenging times. Those who came before created a solid foundation, enabling Little Oak to continuously grow, improve and evolve. Little Oak has transitioned into the era of profitability and the school is now positioned into an entity that is stable and able to grow. Little Oak continues to demonstrate adaptability, consistency, growth, and confidence. We continue to look to the future and steer our efforts toward the very highest ideals of a Montessori education and a connected community. On behalf of the Board of Directors, thank you!



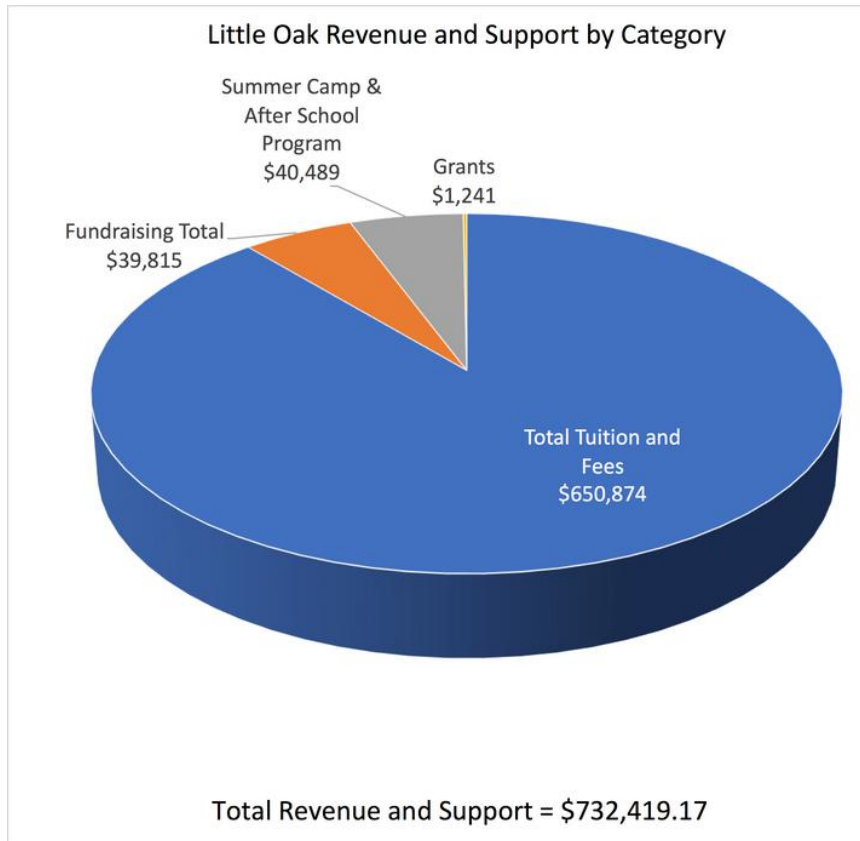
Rachel Montague
Chair, Little Oak Montessori School Board



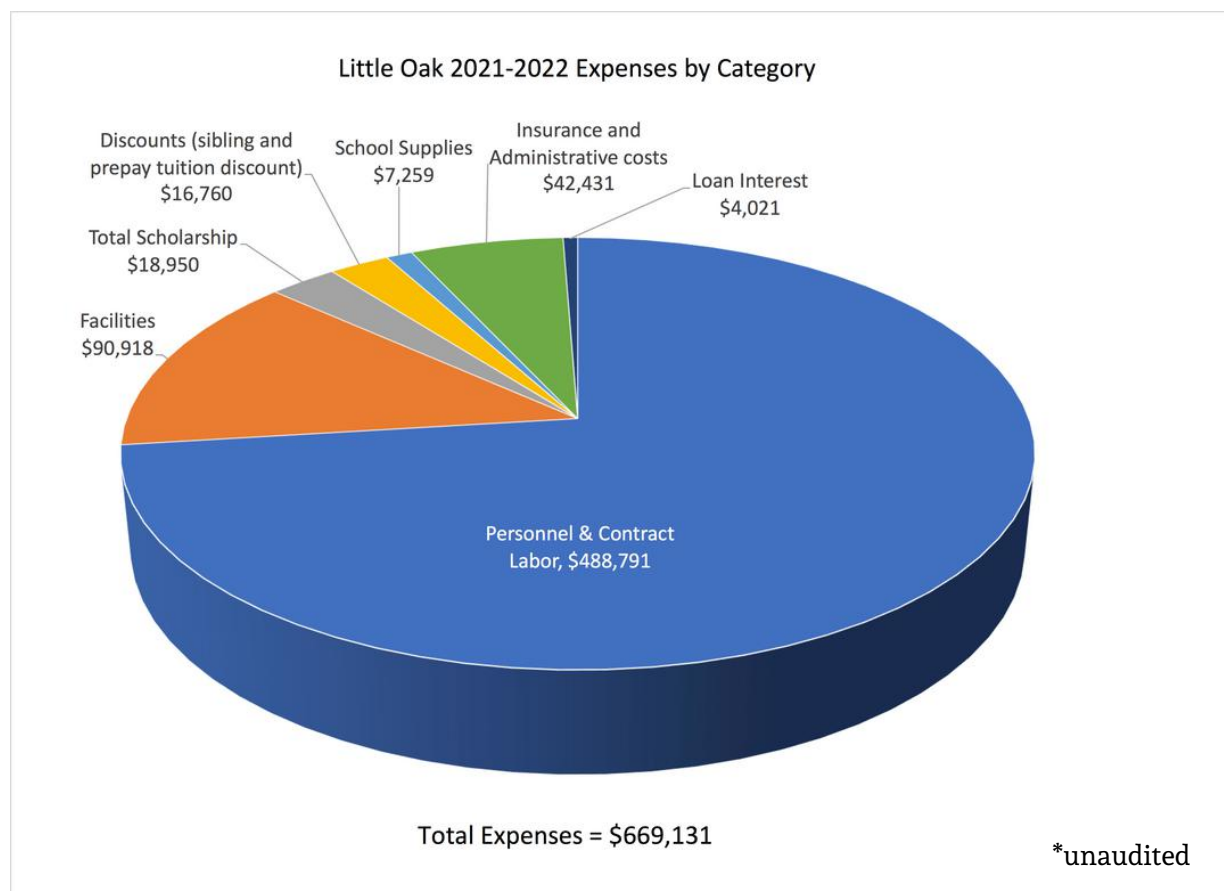
FINANCIAL REPORT

Fiscal year ending July 31, 2022*

Revenue and Support



Expenses



*unaudited



We are delighted to continue building relationships within our community. Elementary students gather weekly with the Pacific Hermitage Monks of White Salmon. The monks share time with our students, offering answers to their questions as well as sharing chants as a token of appreciation for meal offerings/Alms.

Highlights: Montessori Graduates of the Gorge

Hood River Valley High School Fall Musical *Anastasia* featured Little Oak Montessori graduate Lucy Hager as Anya/Anastasia

Source: Columbia Gorge News, Trisha Walker Photo. Oct 26, 2022



Local Area Enrichment and Extended Learning Opportunities of 2021-2022

Weekly Monk visits lead in meditation
Class visits to Columbia Gorge MakerSpace
Pamela Larson – Celilo Project
Camp Trips to Ekone Ranch and Campfire Wilani
Columbia Gorge Discovery Center Raptor Program
White Salmon Fire Department visits Children's House
Ashley Erdely's Wildflower School
Worm Composting - Phoebe Kruchoski
Spanish Club - Brittany Bernard



Supporters

Little Oak would not be the school it is without the ongoing support of all members of its community from current and past families and grandparents, to teachers, alumni, and friends of the school. This generosity supports Little Oak now and in the school's future. Thank you! It matters!

Thank you to all of our generous donors!

The donor lists reflect contributions during the 2021-2022 fiscal year ending July 31, 2022.

Cash Donors / Contributions

Robert & Jane Lewit, Shahnne Head, Kristen Campbell, David Cleaveland & Eleanor Lemmann, Nashira Reisch & Jim Miller, Lach Litwer & Alexia Kelly, Therese Franger, Deborah Humphrey, Gerald & Leah Wells, Monika & Steve Colton, Robert Elliott, Lara Miller, Joellen & Eric Bingener, Jenna Schreiber, Ryann & Aron Kivel, Monique Mos & , Jesse Papac, Cassandra & Pete Kotkas, Alia & Eric Breon, Cynthia & Eric Lindsay, Nichole & Erik Ekman, and Katie & Simon Weaver, Anonymous

Fall Fair Raffle Donors

COR Cellars, Ruddy Duck, NK Studios, Henni's Kitchen & Bar, MoonMountain Highway Mercantile & Studio, Mugs Coffee & The Lewit Family.

Auction Sponsors

Gus & Steel, Kula Chiropractic, Proactive Financial, Alpenglow Farm & Garden, Bottom Line Solutions, & Treebird Family Market.

Auction Donors

Columbia Gorge Discovery Center, Kelly Turso Photo, Surf Salon, Oregon E-Bikes, Bluebird Hats, Ashley Erdely, Keli Aiello, Mark Nilsson, The Grimm Family, The Breon Family, Best Western Hood River Inn, Little Mountain Occupational Therapy, The Little Oak School Board, Cynthia Lindsay, MoonMountain Highway Mercantile & Studio, The Tamfer Family, Wet Planet, Trout Lake Cozy Cabins, Pete Kruchoski, Blue Bus Cultured Foods, The Schmidt Family, Chalk, Shelley & Ian Tattam, Athena Frost, Fruit Loops Art Center, Gus & Steel, Kula Chiropractic, COR Cellars, BeHold Life Packs, Cassandra Kotkas, Grandma Jo, Hood River Soaring, & Camille Hinman- The Scheme of Things



In-Kind Donations

The personal donation of goods and services is an important part of our in-kind gift program.

Eric Bingener, Kris Ostness, Ian Tattam, Chardonnay Vance & David Massey.

Thank you to our 2021-2022 families for your gifts of time, talent, and treasures!

Caitlin & Emily Alcott, Meg & Luke Bradford, Kathryn & Shane Eagan, Lucy Mason, Jim Mason, Cindy Belander, Carrie Benson & Jeff Stageberg, Katie & Simon Weaver, Joellen & Eric Bingener, Adrienne & Sam Grimm, Bea Acosta & Adam Wagner, Laurel & Philip Schmidt, Audrey Collins, Dave Watson, Caroline Grew & Tucker Szymkowicz, Jennifer & Adam Deskin, Laurel & Harrison Henschel, Alia & Eric Breon, Kristin & Colin Franger, Scott Tamfer & Rachel Montague, Janelle Christian & Josh McKenzie, Pete & Cassandra Kotkas, Paige & Kyle Jones, Mersadie Vasquez, Carmen Brown, Lindee & Ben Lewit, Jesse Papac, Erica Didier, Lorelei Haukness & Ralph Cianflone, Matt & Jennifer Morrow, Erica & Ian Mortensen, Cynthia & Eric Lindsay, Laura & Andrew Bissell, Susan & Adam Elliott, Chelan Harkin, Noah Harkin, Kika Kielpinska, Barbu Panaitescu, Ryann & Aron Kivel, Katie & Joe Kula, Lach Litwer & Alexia Kelly, Jennifer Silapie & Kris Ostness, Wyatt Rivas & Christina Sadler, Jonathan & Samantha Soffer, Ian & Shelley Tattam, Kelly & Spencer Turso-Tacon, Christine & Kipp Baratoff, Kay Alton & Scott Cushman, Nichole Ekman & Erik Ekman, Marianne Paradis-Lemay & Richard Flinchbaugh, Phoebe & Pete Kruchoski, Catherine Loke, John Edwards, Laura & Jason Mann, Debby & Rich Phaneuf, Ashley & Kirby Erdely, Zan & Aurora Mann, Sandi Scheinberg, Gabe Spence, Mandy & Nick Whaley



Ways to Contribute:

- Fall Fair Raffle
- Annual Giving
- Attending and Procuring Items for Annual Gala
- Regular, ongoing contributions
- Grandparents Day
- Through the donation link on our website:
www.littleoakmontessori.com



Volunteers make a difference

This year 48 families gave their time and talents over the course of 960 volunteer hours to help with Little Oak facilities, school improvement, enrichment, and events. Volunteers cleaned and painted classrooms, stabilized play yard fencing, weeded and fixed potholes, and spread wood chips. Thank you for keeping our campuses safe and beautiful and for helping our events and enrichment activities go so smoothly!

Our broader Gorge community members also graciously contributed their expertise: counseling professionals, a Montessori consultant, legal experts, human resource consultants, musicians and artists, and local Native American elders all helped Little Oak this past year!



Thank you to Kris Ostness for volunteering time, tools, and expertise to fix the gate at Children's House!

Thank you to our 2021-2022 staff for your gifts of time, talent, and treasures!

Jenna Anderson, Kaylee Baker, Siena Ballance, Julia Bartos, Brittany Bernard, Carmen Brown, Camille Bush, Kristina Cronkright, Kathryn Eagan, Athena Frost, Lindee Lewit, Hannah McCulloch, Jil Parrish, and Abby Young.



Little Oak staff members gathered for an inservice February 2022 with Association Montessori International trainer Sheri Bishop, M.Ed. to discuss methods for integrating elements of social justice issues into the Montessori Classroom.



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