



our time to grow

Undercroft
Montessori School • est. 1964

2020-2021 ANNUAL REPORT



Dear Undercroft Community,

What a year we have all weathered together! One of the hallmarks of Undercroft Montessori School is our caring, committed community, and that truth truly never shines more brightly than when we face a challenge together. Before sharing anything else, let me express from the bottom of my heart: thank you for your role in supporting and sustaining us through this exceptional year.

The 2020-2021 school year truly looked like none other on its face, due to the continuing COVID-19 pandemic. Our students and staff rose immediately to the challenge of face masks, increased sanitation procedures, limiting interaction between class cohorts, indoor/outdoor learning environments, and more. Beyond tackling the difficulties, together they made the school year an enormous success, and one in which there was zero spread of the virus on campus. Team work has never been more apparent than when watching our community work in partnership to prioritize safe, enriching in-person learning.

Our students' success and safety was made possible by you – our families, friends, donors, and supporters. Because of you and your conscientiousness, our doors remained open for the entire school year. Because of you and your generosity, our funding covered enhanced cleaning, supplies, upgrades to classrooms, and more, despite a temporary dip in enrollment. And because of you and your continuing support, we are looking forward to our time to grow.

For a dozen years, I have served as Undercroft's Head of School, a true highlight of my career. It is because of the incredible community that surrounds and uplifts our students that they continue to flourish. Thank you for helping us through this unprecedented year. We are grateful for you.



Warmly,

Nancy Davis
Head of School



FROM THE BOARD PRESIDENT

Dear Friends and Supporters,

In the midst of a trying year, I have never witnessed a community pull together the way Undercroft did during the 2020-2021 school year. Between eager compliance with the Pandemic Response Plan and enthusiastic support of our fundraising efforts, our families and donors made a difficult year much better than it could have been.

As Undercroft's Board President, I have a fiduciary responsibility to ensure the financial stability and growth of the school. Fortunately, I am not alone in this dedication, as so many of you demonstrated this past year. Despite pandemic-related low enrollment, our community responded to the call and exceeded our fundraising goals. In April 2021, our team pivoted and re-imagined the 20th annual FUNDERaiser as an online event. We were all unsure of how it would work and how our attendees would respond, but ultimately we were blown away by the high attendance, generosity, and enthusiasm that the event garnered. You helped us gross \$75,000 – a record for the school, and nearly 50% more than in a typical year.

Our 2020-2021 Annual Fund campaign was also a surprising success, with increased average gift sizes that led to \$78,000 in donations, growth of 30% over other years. I was pleased to see several new names join me as a Leadership Circle donor this year. If you have not joined this tier for the 2021-2022 year, consider increasing your gift as a demonstration of your faith in this incredible school. And if you're not able to donate at that level, please join me in making a gift that is significant to you. The Annual Fund thrives on donations at all amounts.

It is gratifying to support the school together with so many caring people who understand the value of a Montessori education. On a personal note, my oldest son just graduated from Undercroft's middle school and set off for high school. Undercroft is the only school he has ever known, and my wife and I are grateful for the foundation his Montessori education has given him to succeed outside these walls.

Though the COVID-19 pandemic is not as far behind us as we had anticipated, now is still a great time to be grateful and hopeful. We are taking precautions for the now but looking to the next, as the demand for our unique educational environment will only continue to grow. Thank you for doing your part in creating a stable, responsive, enriching environment for our children and generations of children to come.

Sincerely,



Robert Thomas
Board President
2020-21 School Year
Parent to Grayden (alum '21) and Beckett (3rd year)

2020-2021 BOARD

Robert Thomas
President

Vanessa Rogers
Secretary

Jogi Makhani
Treasurer

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Aaron Bean
David Daugherty
Elizabeth Edwards
Cassidy Hotz
Bevan Houston
Jamie Jones
Amanda Lovelace
Brett Palmer
Becca Povlock
Aaron Rogers
Sean Shadid
Norm Smaligo



ANNUAL FUND

DONORS BY AMOUNT

TOTAL RAISED:
\$78,139.60

\$5,000 and up

Fayenelle & Jay Helm
Philip & Miranda Kaiser
Heidi & Sean Shadid
Robert & Laura Thomas
Tulsa Community Foundation

\$1,500-2,499

Justin & Leah Hall
Jamie & Dave Jones
Harold & Sandra Nordstrom
WPX Energy

\$1,000-1,499

Naveen & Shila Kumar
Kevin Reid & Sindy Wendler-Reid

\$500-999

Aaron & Bota Bean
Jessica & David Bellamy
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Deborah Burke
Tess Hanner
Jared Housh & Kara Allison-Housh
Bevan & Evie Houston
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Jogi & Kristin Makhani
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Bryce & Sunshine Murray
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Troy & Crystal Maguire
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Andy & Kelli Miller
Andrew & Megan Myers
Negnet Solutions
Brett & Melanie Palmer
Taweechai & Megan Qunfoong
Vanessa & Bryan Rogers
Chance & Tyler Rush
Eric Sall & Rachel Hayes
Chris & Jordan Sanders
Elena & Brandon Schmidt
Jamie Shilling
Norm & Diana Smaligo
Tia & Ross Swearingen
Robert & Laura Thomas
Brigid Vance & Javier Sagel
Victor Vargas & Imsun Oh
Rob & Alex Walenta
Brent & Sonia Yarbrough

to \$99

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Anonymous
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Tracy Chappelle
Kyra Clark
Phillip & Debbie Decker
Anna & Martin Dodgen
Laura Faudree
Fidelity Charitable
Carolyn Flippo
Mia Gutierrez
Cassidy Hale
Lynnah & Derrick Hall
Anita & Eric Hundley
Lori & John Karmazin
Jason Kinder & Addi Marin-Kinder
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Bryce & Traci Langley
Kate Lehman & Jordan Westbrook
Sara Lewis & John Moran
Hector & Heather Lozano
Monte & Victoria Maderazo
Samuel & Rachel Martin
Tricia & Shawn Massey
Necia & Robert McClendon
Mike McMahon
Tamara & David Morton
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Jennifer & Zac Clark
Emily Murphy
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Tom & Amber O'Stasik
Andrea & Matthew Sawyers
Gretchen Sterba & Ryan Price
Barbara & Andrew Stuart
Greg & Vicki Thorne
Ronald & Stacy Timoshenko
Terriann & Jim VanDeventer
Donna & Raymond Vandiver
Holly Vicari & Blake England
Lori & Jeff Walderich
Mike & Sara Walters
Paula & Bill Williams
Amanda & Buddy Wilmoth
Bliss & Jeff Wilson
Rachel & Nick Woodward

ANNUAL FUND

DONORS BY TYPE

ALUMNI FAMILIES

Tracy Chappelle
Jared & Kelly Goldfarb
Lynnah & Derrick Hall
Timothy Ihrig & Christine Anderson-Ihrig
Philip & Miranda Kaiser
Lori & John Karmazin
Jogi & Kristin Makhani
Alison & John Meeks
Harold & Sandra Nordstrom
Kathleen Plunkett & Arlan Andrews Jr.
Brigid Vance & Javier Sagel
Mike & Sara Walters
Bliss & Jeff Wilson

BOARD GIVING

Aaron & Bota Bean
David & Leslie Daugherty
Elizabeth & Jordan Edwards
Cassidy Hale
Bevan & Evie Houston
Jamie & Dave Jones
Amanda & Blake Lovelace
Jogi & Kristin Makhani
Brett & Melanie Palmer
Rebecca & Joe Povlock
Aaron & Jill Rogers
Vanessa & Bryan Rogers
Sean & Heidi Shadid
Norm & Diana Smaligo
Robert & Laura Thomas

PARENTS

Katie Allison
Alan Barker & Lesley Wilkin
William Bartels & Julie Counterman
Kendall Bass
Aaron & Bota Bean
Jessica & David Bellamy
Amanda Bilbery
Eddie & Ana Bryan
G.T. & Susan Bynum
Kristen Casey
Kyra Clark
David & Shannon Coman
Christopher & Kathryn Cox
David & Leslie Daugherty
Kelly David
Kevin David
Paul & Julie Davis
Elizabeth & Jordan Edwards
William Esquivel
Les Galbraith & Lori Rogers
Margy & Jeff Gillispie
Mia Gutierrez
Cassidy Hale

Guy & Lynne Hall
Justin & Leah Hall
Lynnah & Derrick Hall
Tess Hanner
Daniel & Alyssa Hopkins
Daniel Hotz
Jared Housh & Kara Allison-Housh
Bevan & Evie Houston
Anita & Eric Hundley
Adam & Angela Jamar
Jamie & Dave Jones
Kenneth & Rebecca Jones
Jason Kinder & Addi Marin-Kinder
Brooke & Justin Kirchner
Naveen & Shila Kumar
Barrie & Jeremy Lamberton
Bryce & Traci Langley
Kate Lehman & Jordan Westbrook
Amanda & Blake Lovelace
Hector & Heather Lozano
Monte & Victoria Maderazo
Troy & Crystal Maguire
Samuel & Rachel Martin
Tricia & Shawn Massey
Necia & Robert McClendon
Mike McMahon
Alison & John Meeks
Cameron & Molly Meyer
Matthew Meyer & Cristin Bruns
Andy & Kelli Miller
Tamara & David Morton
Jennifer & Zac Clark
Bryce & Sunshine Murray
Andrew & Megan Myers
Tom & Amber O'Stasik
Brett & Melanie Palmer
Rebecca & Joe Povlock
Taweechai & Megan Qunfoong
Kevin Reid & Sindy Wendler-Reid
Aaron & Jill Rogers
Vanessa & Bryan Rogers
Chance & Tyler Rush
Eric Sall & Rachel Hayes
Chris & Jordan Sanders
Andrea & Matthew Sawyers
Elena & Brandon Schmidt
Sean & Heidi Shadid
Dave & Lauren Sherry
Jamie Shilling
Norm & Diana Smaligo
Mike & Joy Stapleton
Gretchen Sterba & Ryan Price
Barbara & Andrew Stuart
Tia & Ross Swearingen
Robert & Laura Thomas
Greg & Vicki Thorne
Ronald & Stacy Timoshenko
Brigid Vance & Javier Sagel

Terriann & Jim VanDeventer
Victor Vargas & Imsun Oh
Holly Vicari & Blake England
Lori & Jeff Walderich
Rob & Alex Walenta
Troy & Loren Westergaard
Paula & Bill Williams
Nick & Rachel Woodward
Brent & Sonia Yarbrough
Anonymous

GRANDPARENTS

Barbara Blanchette
Deborah Burke
Nancy & Dennis Davis
Karl & Jeanne Hayes
Kathleen Housh

FRIENDS OF UMS

Jared Culley
Fayenelle & Jay Helm
Negnet Solutions
Network for Good
Tulsa Community Foundation
Starr Snead

2020-2021 STAFF

Anonymous
Barbara Blanchette
Tracy Chappelle
Nancy & Dennis Davis
Phillip & Debbie Decker
Anna & Martin Dodgen
Laura Faudree
Carolyn Flippo
Mia Gutierrez
Lynnah & Derrick Hall
Anita & Eric Hundley
Lori & John Karmazin
Kate Lehman & Jordan Westbrook
Sara Lewis & John Moran
Tricia & Shawn Massey
Necia & Robert McClendon
Teresa & Bill Mossburg
Emily Murphy
Andrea & Matthew Sawyers
Gretchen Sterba & Ryan Price
Barbara & Andrew Stuart
Brigid Vance & Javier Sagel
Terriann & Jim VanDeventer
Donna & Raymond Vandiver
Holly Vicari & Blake England
Amanda & Buddy Wilmoth

FUNDERaiser DONORS

TOTAL RAISED:
\$74,715.00

SPONSORS

Heidi & Sean Shadid | Robert & Laura Thomas
George Kaiser Family Foundation
Fayenelle & Jay Helm
Becca & Joe Povlock
Advancement Connections
Asemio
Jessica & David Bellamy
Eller & Detrich, LLC
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Michon Hastings Hughes | Sherwood McCormick and Robert
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Kathleen Plunkett & Arlan Andrews
Bliss Wilson
Shawn Davis
Cassidy Hale
Kathleen Housh
Rebecca & Kenneth Jones
Megan & Taweechai Qunfoong
Donna Shirley
Anonymous

EVENT DONORS

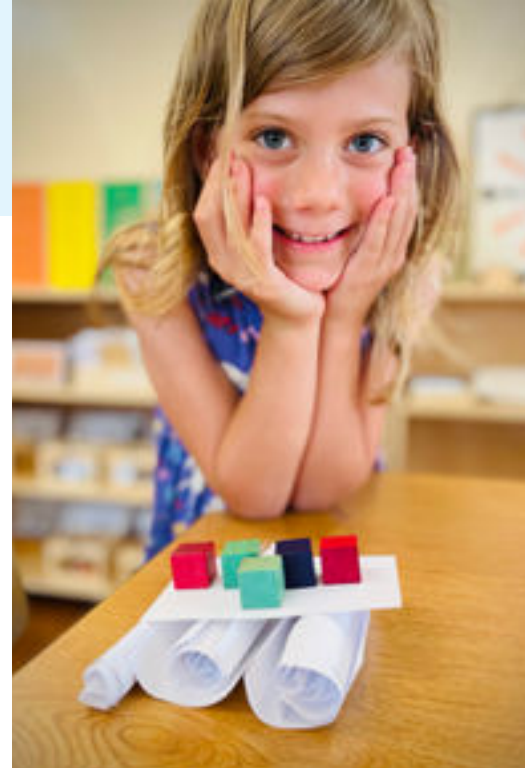
Sydney
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Jessica & David Bellamy
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Barbara Blanchette
G.T. & Susan Bynum
Raigan Caruthers
Tracy Chappelle
Randal Colbert & Tara Patrick-Colbert
David & Shannon Coman
Christopher & Kathryn Cox

Kyden & LaShawn Creekpaum
David & Leslie Daugherty
Tracey & Chris Davis
Paul & Julie Davis
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Caleb & Elizabeth Edwards
Elizabeth & Jordan Edwards
Laura Faudree
Annie & Scott Ferris
Anonymous
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Jamie & Gerard Gartside
Justin & Leah Hall
Tess Hanner
Luke Harris & Kim Williams-Harris
Michon Hastings Hughes
Karl & Jeanne Hayes
P. Dean & Sarah Holbird
Kathleen Housh
Bevan & Evie Houston
Anita & Eric Hundley
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Steve & Liz Jeter
Jamie & Dave Jones
Kenneth & Rebecca Jones
Nathan & Anna Keltner
Jason Kinder & Addi Marin-Kinder
Barrie & Jeremy Lamberton
Bryce & Traci Langley
Amanda & Blake Lovelace
Troy & Crystal Maguire
Jogi & Kristin Makhani
Tricia & Shawn Massey
Alison & John Meeks
Cameron & Molly Meyer
Andy & Kelli Miller
Jennifer & Zac Clark
Emily Murphy
Andrew & Megan Myers
Shiloh & Jeff Oliver
Brett & Melanie Palmer
Rebecca & Joe Povlock

Taweechai & Megan Qunfoong
Kevin Reid & Cindy Wendler-Reid
B.R. & Kameron Ritzhaupt
Aaron & Jill Rogers
Vanessa & Bryan Rogers
Melanie Ross
Brian & Katie Sachse
Robert Sachse
Eric Sall & Rachel Hayes
Andrea & Matthew Sawyers
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Dave & Lauren Sherry
Norm & Diana Smaligo
Randa Smaligo
Starr Sneed
Tia & Ross Swearingen
Robert & Laura Thomas
Brigid Vance & Javier Sagel
Victor Vargas & Imsun Oh
Rob & Alex Walenta
Troy & Loren Westergaard
Jamie & Roger Wheeler
Amanda & Buddy Wilmoth
Bliss & Jeff Wilson
Joseph & Jessica Zink

COMMITTEE & VOLUNTEERS

Elizabeth Edwards (co-chair)
Laura Thomas (co-chair)
Cassandra Barrow
Jennifer Clark
Jamie Jones
Barrie & Jeremy Lamberton
Addi Marin-Kinder
Alison Meeks
Rebecca Povlock
Vanessa Rogers
Katie Sachse
Heidi Shadid
Sindy Wendler-Reid



OTHER DONORS

Spirit Nights

Chipotle Mexican Grill
Hideaway Pizza
On the Border
The Traditional Bakery, Inc.



ACTIVITIES & ACCOMPLISHMENTS

- Worked alongside the Crisis Response Team to implement a Pandemic Response Plan, which enabled us to hold an entire school year of in-person learning with zero recorded cases of COVID-19 transmission on our campus.
- Started the 2020-2021 school year with 205 students and ended with 213; this enrollment was low due to the pandemic and financial/health situations of some families.
- Moved enrollment for the 2021-2022 school year online; fully completed the process by February deadline, with 99% retention – an Undercroft first!
- Held 73 in-person tours and four (4) virtual tours for prospective families, resulting in record enrollment for the 2021-2022 school year.
- Began work with Diversity, Equity and Inclusion consultant to develop outreach and recruitment strategies to increase diversity among students and staff, as well as to ensure the equity and inclusion of all community members.
- Had a record fundraising year between our Annual Fund and our first virtual FUNDERaiser, the latter also boasting nearly double the usual attendance.



INCOME & EXPENSES

INCOME

| | |
|---------------------|-----|
| Tuition | 87% |
| Aftercare | 5% |
| Development | 5% |
| Summer School | 3% |

EXPENSES

| | |
|------------------------------|-----|
| Payroll and Emp. Benefits .. | 82% |
| Insurance | 6% |
| Materials/Supplies | 7% |
| Utilities | 5% |





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undercroft.org