From the American Montessori Society President & Executive Director

Dear Members and Friends of AMS,

We are delighted to bring you this report on the activities and notable achievements of the American Montessori Society (AMS) for fiscal year 2009 (July 1, 2008 – June 30, 2009), in particular the many groundbreaking measures we've taken to expand our services to teachers, schools, and teacher education programs and strengthen our ability to champion the rights of children and youth worldwide.

Growth

In fiscal 2009, AMS **individual and school membership** swelled to 11,629 and 1,238 members respectively, the number of **accredited schools** reached an unprecedented 162, and 1,612 individuals **earned Montessori credentials** from AMS-affiliated teacher education programs, helping to ensure the availability of Montessori classrooms for more children around the world. We increased our capacity to provide professional development for our members and advocacy for Montessori education by hiring our first **research coordinator.**

Gatherings

We dedicated our 2009 **Annual Conference** in New Orleans, Louisiana, to "Peace and Social Justice" and acted on that theme by partnering with a local organization, Hands On New Orleans, to offer a Day of Service. Powerful keynote speakers kept us focused: Greg Mortenson (*Three Cups of Tea*); Spike Lee (*The Day the Levees Broke*); Riane Eisler, PhD (*The Blade and the Chalice*), and AMS Living Legacy Marie M. Dugan. Our **fall conference** in Southern California featured keynote speaker JoAnn Deak, PhD (*Girls Will Be Girls: Raising Competent and Courageous Daughters*). A **heads of schools retreat** in Cozumel, Mexico, discovered "The Courage to Lead" with facilitator Paul Michalec, PhD.

Governance

The AMS Board of Directors is a team of nearly 20 volunteers (some elected, some appointed) who work behind the scenes to establish the vision and set the policies of the American Montessori Society. Of critical importance throughout FY 2009 was the Board's **Finance Committee**, whose members worked tirelessly to maintain the security of our reserves, or "rainy-day fund," to ensure the financial stability of our organization during the financial instability of the time.

Other priority issues the Board addressed during the year included an ongoing examination of professional standards, the growth of Montessori in the public schools sector, and the growth of Montessori internationally.

A **Task Force on Professional Standards** Committee reviewed critical matters related to degree requirements, administrator qualifications, and more, in preparation for recommendations to be made to the Board of Directors in FY 2010.

Giving

We received the **largest matching grant** offered in the history of AMS ($50,000) thanks to the generosity of Eveline and Bob Roberts, and through the dedicated efforts of our Living Legacy Committee, **the most money ever raised in a single year** for the Teacher Education Scholarship Fund ($109,807).

Gearing up for 2010

Against this busy backdrop, AMS staff and volunteers were industriously working to pave the way for the following momentous initiatives which would unroll in fiscal 2010 and beyond:

- The ecologically sound transition of some of our most important publications, such as our conference program books, to electronic media
- Our debut conference in partnership with the Chinese Montessori Foundation (which occurred in Taipei, Taiwan, in August 2009), themed "Montessori IN and FOR Asia"
- Bringing Montessori to the mainstream with our first-ever exhibition booth at the National Association for the Education of Young Children's annual conference (the largest early education conference in the world)
- A new, fully expressed visual design system for AMS
- A sophisticated new association management system that will allow us to stay in closer touch with our members; more accurately maintain credentialing, enrollment, and accreditation data; and allow members to review their AMS records and update their professional profiles and contact information online
- A thoroughly redesigned Website providing easy-to-navigate, information-rich content organized for the convenience of all of our major stakeholder groups
- A series of Webinars—seminars presented live over the Internet by AMS staff—in which colleagues can participate from their offices, schools, or homes anywhere in the world
- The 2010 Annual Conference in Boston, Massachusetts, which will explore "Montessori in the 21st Century" and celebrate our Golden Anniversary—50 years of AMS— and our founder, Dr. Nancy McCormick Rambusch.

On the following pages, you will find details of the financial activity of the American Montessori Society during fiscal year 2009. But our story doesn't end there! For a thorough understanding of all that we've been up to and what we are working to achieve in the days, months, and years ahead, we encourage you to browse through the pages of our Website (www.amshq.org), where we document all of our activities. And, watch for our monthly e-newsletter in your inbox.

Sincerely,

Marilyn Stewart — Richard A. Ungerer

Marilyn E. Stewart
President

Richard A. Ungerer
Executive Director

Donors

The American Montessori Society raises funds to support the organization's programs and services, which further Montessori education. To achieve our fundraising goals we rely on you—our dedicated members and friends. Every gift, regardless of size makes a difference. Thank you for your continued support!

Annual Fund

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Whitby School

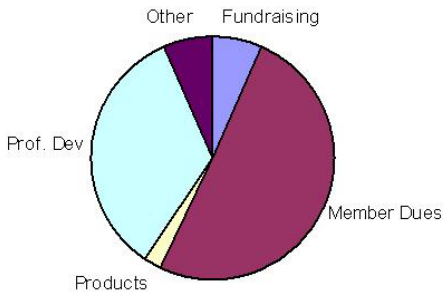
We have made every effort to be accurate in acknowledging all who have contributed to our organization. Unfortunately, mistakes do occur. If your name has been overlooked, please accept our apologies and contact Kristine Cooper at Kristine@amshq.org.

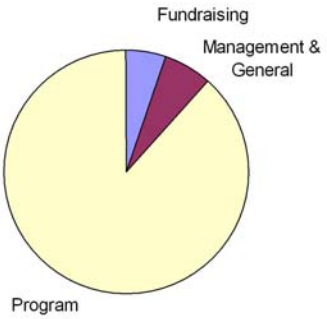
STATEMENT OF ACTIVITIES	FY 2009	FY 2008	FY2007
REVENUE AND OTHER SUPPORT			
Dues and Fees	$1,722,613	$1,765,197	$ 1,640,396
Conferences	1,157,400	1,368,525	1,794,014
Products and Publications	86,377	138,080	158,345
Heads of Schools Retreat	8,555	12,600	4,016
Symposia*	-	-	40,391
Royalty Income	52,326	61,940	69,340
Advertising	117,941	126,993	144,057
Contributions	234,147	445,146	208,531
Interest Income	57,652	91,720	64,977
Miscellaneous Income	4,220	5,119	3,391
TOTAL REVENUE & OTHER SUPPORT	**$3,441,231**	**$4,015,320**	**$4,123,442**
EXPENSES - PROGRAM SERVICES			
Membership	$977,958	$964,699	$903,378
Teacher Education	331,774	281,390	309,244
Products and Publications	477,978	488,799	448,172
Heads of Schools Retreat	16,137	15,781	18,618
Conferences	1,063,730	1,323,319	1,353,674
Symposia*	-	-	47,233
Scholarship, Peace, and Research	68,577	39,786	51,190
TOTAL EXPENSES - PROGRAM SERVICES	**$2,936,154**	**$3,113,774**	**$3,131,509**
SUPPORTING SERVICES			
Management and General	182,072	$233,703	$226,518
Fundraising	145,723	140,610	188,097
TOTAL SUPPORTING SERVICES	**327,795**	**$374,313**	**$414,615**
TOTAL EXPENSES	**$3,263,949**	**$3,488,087**	**$3,546,124**
Increase in Net Assets	$177,282	$527,233	$577,318
Net Assets at Beginning of Year	2,205,617	1,678,384	1,101,066
NET ASSETS AT END OF YEAR	**$2,382,899**	**$2,205,617**	**$1,678,384**

* AMS did not host symposia during FY 09 or FY 08.

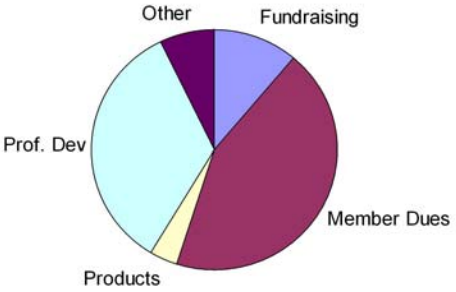
All financial information presented here is based on the Financial Statements provided in the Independent Auditors Reports prepared by Condon O'Meara McGinty & Donnelly LLP for the American Montessori Society.

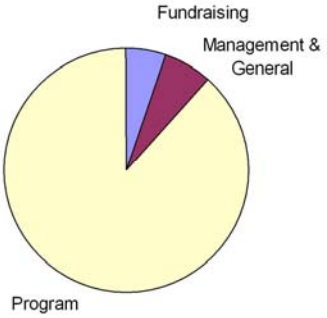
REVENUE FY 09			EXPENSES FY 09		
Fundraising	$234,147	7%	Fundraising	$145,723	4%
Member Dues	1,722,613	50%	Management & General	182,072	6%
Products	86,377	2%	Program	2,936,154	90%
Professional Development	1,165,955	34%			
Other	285,772	7%			
TOTAL	**$3,441,231**	**100%**	**TOTAL**	**$3,263,949**	**100%**





REVENUE FY 08			EXPENSES FY 08		
Fundraising	$445,146	11%	Fundraising	$140,610	4%
Member Dues	1,765,197	44%	Management & General	233,703	7%
Products	138,080	4%	Program	3,113,774	89%
Professional Development	1,381,125	34%			
Other	232,139	7%			
TOTAL	**$4,015,320**	**100%**	**TOTAL**	**$3,488,087**	**100%**





RESTRICTED FUNDS	Balance as of 06/30/08	Balance as of 06/30/09
Peace Fund	$12,273	$17,377
Research Fund	23,151	9,909
Scholarship Fund	34,093	92,310
Centennial Fund	363,915	345,774
TOTAL	**$433,432**	**$465,370**

NET ASSETS

FY 09: $2,382,899 **FY 08:** $2,205,617 **FY 07:** $1,678,384+

+This includes $350,000, which was designated by the AMS Board of Directors to be used for new initiatives to support priority projects.

All financial information presented here is based on the Financial Statements provided in the Independent Auditors Reports prepared by Condon O'Meara McGinty & Donnelly LLP for the American Montessori Society.

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2008-2009

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2009-2010

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Mission Statement

AMS provides the leadership and inspiration to make Montessori a significant voice in education. The Society advocates quality Montessori education, strengthens members through its services, and champions Montessori principles to the greater community.

Upcoming AMS Conferences

Fall 2010Conference
San Diego, CA
October 22-24, 2010

2011 Annual Conference
Chicago, IL
March 24-27, 2011

2012 Annual Conference
San Francisco, CA
March 15-18, 2012

We'd Love to Hear from You!

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