



2020-2021

ANNUAL REPORT



THE CAREY SCHOOL





The Mission of The Carey School

Specializing in elementary education, The Carey School inspires curious, confident and joyful learners and celebrates childhood in an inclusive, diverse community that nurtures kindness, respect and personal responsibility.

Our Commitment

Educate each child through an academically challenging and balanced Pre-Kindergarten to Fifth Grade educational curriculum based on the fundamentals of reading, language arts, and math.

Advance our curriculum with integrated studies in science, music, art, world languages, technology, library studies, physical education and other enrichment programs.

Enable students to reach their fullest potential by providing a developmentally appropriate curriculum that nurtures cognitive, creative, social-emotional and physical growth.

Sustain a culture of teaching excellence through passionate faculty, curriculum reviews, collaboration and professional development.

Partner with families to maintain our inclusive community and build student awareness of self as well as the world beyond.

Graduate enthusiastic, life-long learners who are prepared with the skills for a successful educational journey.



HEAD OF SCHOOL LETTER

Duncan Lyon, Head of School

A parent once told me that Carey is one of a kind. We were all reminded of that notion during the 2020-2021 school year when our dedicated faculty and resourceful families partnered to educate 265 students in ways new and familiar. The value of a strong home-school partnership took on additional meaning as we enacted our “every student, every day” commitment to in person learning on two campuses. Word traveled fast and wide. Applications for the school increased significantly. In a humbling year, Carey students and those who supported them thrived.

By any measure, Carey is prospering because of all who contribute on a daily basis to the exceptional student experience, but also because of a strong tradition of philanthropy among our families and a legacy of disciplined financial oversight by our board. Today, as these pages show, we enjoy a position of financial strength because of the hard work and commitment of our development office, fundraising volunteers, and all of you. Your ongoing, generous support has resulted in the school’s solid foundation. We are deeply grateful.

The 2020-2021 school year was yet another financially successful year for The Carey School. Our fund to live by, The Carey Fund, broke records once again, raising \$768,000 for the first time in the school’s history. We continued our stellar record of participation among families, faculty, and staff, as well as our extended family of grandparents, alumni, and friends of the school. At the same time, we continued the broad fundraising appeal for our Expanding Possibilities capital project, achieving our goal of fully funding the project. Along the way, we maintained discipline around spending and lived within our means. We should be proud of these results, and the incredible spirit of giving they represent.

Thank you for helping make Carey so singular.



BOARD PRESIDENT LETTER

Jennifer Chung, President of the Board of Trustees

In many ways, the 2020 – 2021 school year highlighted the strength and resilience of The Carey School community. Despite the challenges posed by the pandemic, our faculty and staff remained committed to teaching and caring for our children while wearing many hats, our parent community volunteered time and resources wherever they were needed, and our children put the values they have learned at Carey into action.

Our timing could not have been more fortunate when it came to campus planning. With the completion of our new building and courtyard, we were able to utilize expanded and modernized spaces as we navigated cohorts, outdoor classrooms, and social distancing. We are grateful for the generous gifts that helped us successfully complete our \$5M Expanding Possibilities capital campaign. Having a modern campus with flexible, multi-purpose spaces will enhance the Carey experience for many years to come.

We also benefited from another successful Annual Fund, thanks to nearly 100% participation from parents, board, faculty, and staff. This year, we raised \$768,000, which is \$240,00 over our goal. Our online Fund-A-Need, directed towards financial aid and faculty support, set a new record by raising \$500,700.

Our 2019 – 2024 Strategic Plan provided longer-term guideposts that kept us grounded and enabled us to prioritize during an uncertain year. One area of focus in our strategic plan is to deepen our commitment to diversity, equity, and inclusion at Carey – the board spent much of the year laying the groundwork and a plan for the next phase of this work, which will begin with a 2022 DEI climate audit.

The Board welcomed five new trustees during 2020-21: Jason Kwok, La Vina Lowery, Kyle Morgenroth, Neha Narang, and Teresa Saks. As we look ahead to the next year, The Carey School is fortunate to be in a position of stability – our school's financial health is strong, admissions demand has grown, and the board and our Head of School continue to work as true partners. Thanks to The Carey School's many friends and supporters, our school continues to be a magical and welcoming place that plays a critical role in helping children achieve their fullest potential.

With my enduring gratitude,
Jennifer Chung



DEVELOPMENT



THE CAREY SCHOOL





DEVELOPMENT COMMITTEE CHAIR LETTER

Lindsay Ramsay, Development Committee Chairperson

Development is vital to sustaining The Carey School, and despite the persistent uncertainty and challenges associated with COVID, I'm thrilled to share that 2020-2021 was a record shattering fundraising year!

First, we successfully closed the Expanding Possibilities Capital Campaign after raising \$5 million to complete our brand new two-story building and renovated courtyard. It is heartwarming to see the joy of students and faculty taking full advantage of our new modernized classrooms, flexible multi-purpose spaces and multifunctional courtyard. Our tremendous gratitude goes out to Carey's Board of Trustees, current families, alumni families, and special friends for making this remarkable improvement to our school.

Alongside the undertaking of the Capital Campaign, Carey's Annual Fund broke another record this year raising \$768,000. This Fund will continue to support all the things that make Carey unique which tuition alone does not cover, including professional development for our educators, special school programs, and other operational needs.

The Carey School Parents Association (CSPA) also pulled off another record breaking event, raising \$500,700 at a modified COVID virtual auction to support Fund-A-Need for financial aid. This tremendous support speaks to the importance and value our community places in ensuring Carey remains a diverse and inclusive community welcoming of all students regardless of financial means.

Finally, this year saw the introduction of a new tradition of a Class Gift to the Faculty Endowment Fund. We raised a little over \$146,000 in this new initiative.

Our essential fundraising would not have been possible without the hard work and dedication of the Development committee members, CSPA volunteers, and donors throughout the Carey community. We are also grateful for the support of the staff, teachers, and parents who pitch in everyday to ensure Carey sustains its mission of creating curious, confident, and joyful learners. We look forward to another exciting year ahead.

ANNUAL FUND COMMITTEE

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STINE AND PETER JEWETT

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SUZANNE AND RICHARD LIU
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ARA AND LORI JABAGCHOURIAN
ASHISH MOTIVALA AND NILOFER MOTIWALA
AUDRA CARLI
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 SHAUN AND BERTHA VANESSA GAMBINA
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 WEB SUN AND JAIME CHEN
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 WELLS FARGO BANK
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ANMOL SHETH AND PAYAL SHAH
ANONYMOUS (12)
ANTHONIE JANSE VAN RENSBURG AND NATASHA TAYLOR
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LYLY PHAM
MADHUKAR NAMBURI AND RADHIKA MEHRA NAMBURI
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NATHAN GEER
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RAMIREZ
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PETER AND STINE JEWETT
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RAZIEL AND HAVA UNGAR
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RYAN AND LAURIE ZANDER
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SUZIE QUINEY
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UBS
VINEET JAIN AND SAVITA PATEL
VINOD AND ELIZABETH DEVAN
VISA
WILLIAM G. IRWIN CHARITY FOUNDATION
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ZANDER FAMILY FOUNDATION



FIFTH GRADE CLASS GIFT TO THE ENDOWMENT

ALBERT AND JULIE LEE
ALEXANDER LOOMIS AND MARNIE BRECKENRIDGE
ANTHONY TSAO
BOB AND TAMI LAHL
BRIAN AND JANINA DONG
BRIAN BAUM AND MOIRA GERAGHTY
CAROLINE LEE
CURT AND LYNN METZGER
DONALD TOY AND MARCIE LOW-TOY
DOUGLAS AND KIM PEPPER
ERIC AND KATE DACHS
EUGENE AND NICOLE ALSTON
FRANS AND DEBORAH OP DEN KAMP
IAN KENNISH AND JANE BUTLER
JACK AND NINA HERNDON
JAMES AND KAYE SLAVET
JASON AND JAMIE KILAR
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KEREM GUNERI AND KIMBERLY SARGENT
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TIAGO AND WENDY DIAS
VIJAY KANAL AND AMREEN HUSAIN
VINAY AND ROOPALI SRIHARI
WYNNETTE LABROSSE



FINANCIAL HIGHLIGHTS



THE CAREY SCHOOL





CFO LETTER

Susan Loveall, Chief Financial Officer

As the COVID pandemic continued into the FY20-21 school year, the school was well positioned to invest in our educational program and the safety of our students, faculty and staff. Through the receipt of a PPP Grant of nearly \$1.0 million, which was spent on FY19-20 and then FY20-21, we were able to provide a safe environment to enable our students to experience on-campus learning. This included weekly PCR testing, enhanced cleaning services, additional cohort classes (3 per grade), modified classroom layouts and additional staff resources dedicated to supporting the educational program.

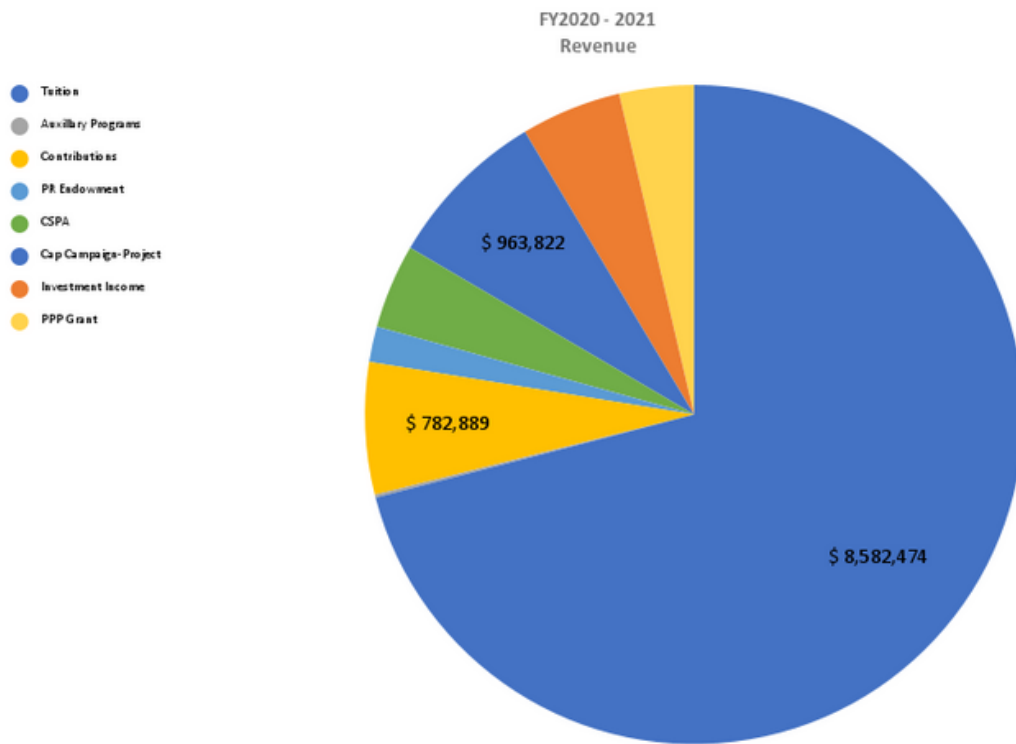
This year also saw us operate a second location for our Early Childhood learning with two PreK classes. This increased our total enrollment capacity to 282 up from the 258 we were capped at the 1 Carey School Lane location.

The Carey School remains in a solid financial position, with enrollment growing with the new site and demand exceeding our capacity. Our total revenue increased 6 percent even with a decrease in auxiliary programs which ceased during COVID. While we have added debt to partially pay for the new second/first grade classroom building, we have strong working capital and a growing endowment. The school had another record year for Annual Fund contributions and record fundraising through the Carey School Parent Association raising over \$500,700. These funds supported both our strategic diversity efforts with financial aid and a one-time bonus for our faculty and staff.

Operating expenditures increased substantially reflecting the increased costs of supporting our on-campus learning. Much of the increase was offset by an increase in the PreK program, some major gifts and the PPP Grant. After capital expenditures and with the PPP Grant, we generated an operating surplus of approximately \$660,366.

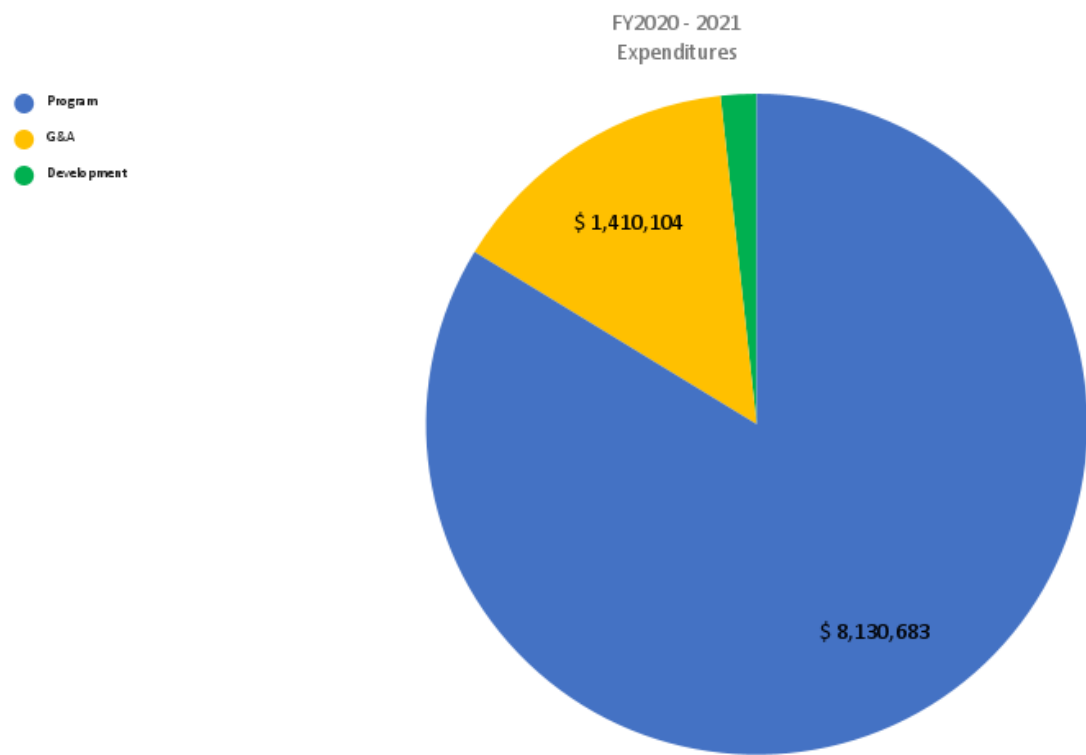
For more detailed information, audited financial statements for the 2020-2021 school year may be obtained from the Business Office.

REVENUE



REVENUES	
Tuition	\$ 8,582,474
Financial Aid	\$ (847,443)
Auxillary Programs	\$ 17,956
Contributions	\$ 782,889
PR Endowment	\$ 210,382
CSPA	\$ 501,521
Cap Campaign-Project	\$ 963,822
Investment Income	\$ 596,316
PPP Grant	\$ 443,116
TOTAL	\$11,251,033

EXPENDITURES



EXPENDITURES	
Program	\$ 8,130,683
G&A	\$ 1,410,104
Development	\$ 169,620
TOTAL	\$ 9,710,407



CSPA



THE CAREY SCHOOL



CSPA PRESIDENT L LETTER

Mimi Jones, CSPA President 2020-2021

The 2020-2021 school year began in the midst of the COVID-19 pandemic with ample uncertainty and concern for what lay ahead. However, our community was cautiously optimistic that things would soon turn around. The first day of school started with remote learning but within a few short weeks, our students were able to return to campus for in-person learning.

While parents were grateful and relieved that the children were able to return to in-person learning, the CSPA had to find innovative ways to keep our community connected during a time when in-person gatherings were not possible at school. Our parent volunteers leading various committees were a huge help in tackling this challenge.

We implemented a school-wide digital family photo directory where families included photos, shared their contact info, and some fun facts about themselves. This tool was highly praised by all and especially new families who didn't know the other families but could at least learn a little about them through the directory.

Our Committees and Room Parents did a fantastic job creating meaningful ways to keep our community engaged. The Community Events Committee hosted a virtual ice cream social and a virtual community Bingo night. The Bingo night was a huge hit. Families had so much fun and many Amazon/Jamba Juice gift cards were awarded that night. The Sustainability Committee's efforts led The Carey School to win the Trex Thin Plastics Challenge after our community collected a total of 522 pounds of plastics! Families participated in Walkfest by walking in their neighborhoods or nearby trails. The Walkfest Committee tracked the students' laps through an app that allowed the children to see how many laps they and their friends had accumulated. The Health and Wellness Committee facilitated events to keep our minds and bodies calm with virtual Yoga classes and a panel discussion with mental health experts on the mental health effects of the pandemic on our community and children. The Room Parents successfully curated some entertaining events such as virtual cocktail/mocktail mixology classes, virtual paint and pour parties, and even a drive-in movie night. Our virtual CSPA meetings had the highest attendance in CSPA history.

Carey's commitment to service did not waver even in a pandemic. The Caring at Carey committee and our community assembled and distributed Halloween Kits to children in the LifeMoves' interim shelters, we also cooked and delivered meals to families at the shelters, we prepared over 100 care packages for local firefighters and collected new underwear, socks and diapers for 160 children in need.

The community's immense gratitude for the incredible job the administration, faculty, and staff were doing was expressed through the efforts of our Faculty and Staff Appreciation Committee (FAC). The FAC dropped off treats, delivered electronic gift cards, and coordinated customized signage of appreciation. During Faculty and Staff Appreciation Week, the FAC planned daily surprises consisting of small gifts, lunches, movie packs, spa kits, and more.

At the Auction in March, the Carey community truly expressed our appreciation by supporting the Above and Beyond Fund to honor our incredible faculty and staff. It's no surprise that such an important Fund a Need would produce a record-setting year for the Auction with the largest FAN in school history raising \$500,700.

All things considered this school year was a tremendous success for The Carey School. We were able to achieve what so many schools around the country struggled to do by providing safe in-person learning for the entire school. Our community demonstrated its strength by working together and supporting each other through hard times. The school year ended on a high note with an in-person graduation ceremony for our fifth graders which was a gratifying win for students, families, and our phenomenal faculty and staff who made it possible.

CSPA EXECUTIVE COMMITTEE

PRESIDENT: MIMI JONES

CO-VICE PRESIDENTS: ESTHER SHEK & STEPHANIE DUNCAN

VICE PRESIDENT, AUCTION: KATRINA SITTER

SECRETARY: KYLE MORGENROTH

NOMINATING COMMITTEE CHAIR: KELLY MARKSON

CSPA COMMITTEE LEADS

Art Liaison: Briana Ishida & David Tse

Book Swap: Teri Handelman

Caring at Carey: Jamie Hwang, Glenna Auerback & Josephine Lochbaum

Community Events: Vierra Wong, Yi-Wyn Colaco & Cecilia Wong

Enrichment Days: Marcie Low & Janina Dong

Holiday Cookie Drive: Lorri Dyner

Pumpkin Patch: Lynn Metzger & Lisa Barr

Supplies Coordinator/PE Clothing Swap: Julianna Achmatow

Community Bulletin Board: Heather Melvin

Extended Care Room Parents: Jennifer Matthews & Stine Jewett

Faculty and Staff Appreciation: Andrea Irvin, Courtney Nicoletti & Kaye Slavet

GOLD: Suzanne Gibbs

Operetta Costumes: Bilge Atali & Amy Goldfarb

Common Ground: Jamie Hwang & Natasha Salins

Spaghetti Dinner: Jo Lochbaum & Jill Melvin

Volunteer Portal: Cora Sharma

Mentoring: Lindsay Ramsay & Lorri Dyner

Walkfest: Elizabeth Devan, Kim Baker & Payal Shah

Auction: Katrina Sitter, Rita Khalfin & Sandhya Talwalker

CSPA DONORS

AARON AND KELLEY KINNEY
ABBY AND BILL JAKOBOWSKI
AJIT AND RESHAM BHARWANI
ALBERT AND JEAN CHIANG
ALEX AND LORRI DYNER
ALEX KAMINARIS AND RACHEL CHANIN
ALEX LOOMIS AND MARNIE BRECKENRIDGE
AMIR ZEINEDDINI AND HAANIEH RIAHI
AMY AND ERIC GOLDFARB
AMY AND EVAN TATO
ANDREA AND BOB IRVIN
ANDREW AND JENNIFER WAY
ANDREW CHANG AND CINDY TSE
ANDREW GROTTA AND ANNE CLAIBORNE
ANONYMOUS X5
ANTHONIE JANSE VAN RENSBURG AND NATASHA TAYLOR
AUGUST BARIZON AND SARA BOUROUMAND
AUSTIN AND ERIN HAUGEN
AYKUT AND BILGE ATALI
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ERIC AND SUYUN KIM
ERIKA SILK
FRANS AND DEB OP DEN KAMP
GAUTAM KEDIA AND SALOMI DAFTARY
GENE AND NICOLE ALSTON
GEORGE AND JULIE O'BRIEN
HAN AHN AND AMY LIN
HAN ZHOU AND LIN XING
HEATHER AND GREG MELVIN
IAN AND SHARON YAHYA
IAN KENNISH AND JANE BUTLER
JACK AND NINA HERNDON

JAMES AND KAYE SLAVET
JAMES SONG AND MARIANNE MOON
JANINA AND BRIAN DONG
JASON AND JAMIE KILAR
JASON AND YOONSUNG TING
JASON AND YUNNIE KWOK
JEFF AND KIM BAKER
JEFF MALTZ
JENNIFER AND YOUNG CHUNG
JIM AND SHANNA GELLAS
JOEL AND TARA DE LA GARZA
JOHN AND COURTNEY NICOLETTI
JOHNNY CHAN AND CECILIA WONG
JONATHAN TRIPP AND MAIKO EZAWA
JOSH AND JULIE ROSSMAN
JULIE AND ALBERT LEE
KAREN HUMMEL AND GREG DIRRENBERGER
KATE AND ERIC DACHS
KATRINA AND MATT SITTER
KELLY AND MIKE MARKSON
KELLY SORTINO AND ANDREW MALCOLM
KEREM GUNERI AND KIM SARGENT
KEVIN AND JENNIFER LAM
KEVIN WUERFEL AND MELISSA WARHAFTIG
KIM AND DOUG PEPPER
KRISHNA CHAGANTI AND SESH MUDUMBAL
KUNAL SHAH AND POOJA DAFTARY
KYLE AND KATIE MORGENROTH
LANCE AND KIM KAVANAUGH
LEAH SOLIVAN AND MICHAEL BREYER
LIANG FANG AND JENNIE YUAN
LINDSAY AND ALEX RAMSAY
LINDSAY AND MATT FOLK
MARC AND JENNIFER ACTON
MARK AND KRIS PUNZALAN
MARK COX AND MOLLY WALKER
MARTIN AND YI WYN COLACO
MATT AND JENNIFER GILLET
MATTHEW AND ERICA MCMULLEN
MEAGAN VINCENT
MELITA AND THAD JAMPOL
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MICHAEL OHLIGER AND HUAIYU YANG
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MILES AND SUZIE TOMLINSON
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MINA AND NATHAN FISHER
NATE GEER
NEELY NORRIS AND BROOKE REYNOLDS
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PETER AND STINE JEWETT
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RAUL AND KARIE VASQUEZ
RAVI RAO AND THAILA SUNDARESAN
RAZIEL AND HAVA UNGAR
RICHARD AND SUZANNE LIU
RICK AND MELINDA OSTERLOH
ROBERT AND KARINA DYKES
RON WAGNER AND SUSAN SHEN
RYAN AND JOYCE CHOW
SAM BRESNAHAN AND LILLIAN WANG
SEAN AND JILL MELVIN
SHAUN AND STEPHANIE DUNCAN
SINCLAIR AND JAMIE HWANG
SOHAN AND SANDHYA TALWALKER
STEVE AND LISSA SEEM
STEVE XANTHOPOULOS AND AMY VINTHER
SUMAN AND SONAL TALUKDAR
SUNDANCE AND CLAUDIA BANKS
SUZANNE GIBBS
THOMAS AND EDNA KIM
TIM CHOY AND VIERRA WONG
TONY TSAO
UMA MAHADEVAN AND FERNANDO VELAYOS
VICTOR AND BRIANA ISHIDA
WEB SUN AND JAMIE CHEN
WEI CHEN AND YAN XIAO
WEI LI AND JIAOMING CHEN
YUNG AND EMILY CHEN
ZACHARY AND JENNIFER PRICE



CSPA ROOM PARENTS

PK

EMILY FANG
JEFF MALTZ
SUMAN AND SONAL TALUKDAR

KH

UMA MAHADEVAN
BILGE ATALI
JAMIE HWANG

KM

NEHA RAMDAS
VANESSA GAMBINA
HAN ZHOU

1R

HAVA UNGAR
NATASHA TAYLOR
MIA MALHOTRA

1Z

RACHEL CHANIN
MELITA JAMPOL
NILU MOTIWALA

2C

AMY VINTHER
LINDSAY RAMSAY
ESTHER SHEK

2F

JASON KWOK
JEFFREY SCHROEDER
RAVI RAO

3D

JOSEPHINE LOCHBAUM
STINE JEWETT
MARK PUNZALAN

3P

RACHEL CHANIN
CONSUELA STEWART
MELISSA SIMS

4K

JAMIE HWANG
SOPHIA TSENG
SUNITA PARBHU

4M

TARA DE LA GARZA
BRIANA ISHIDA
ANDREW WAY

5C

NINA HERNDON
JANINA DONG
JEAN LEE

5L

KAYE SLAVET
MARNIE BRECKENRIDGE
KIM PEPPER



THE CAREY SCHOOL

