

# the Annual Fund

2025-26

## Why does Berkeley Carroll need to fundraise on top of tuition?

Charitable gifts sustain the people and programs that make Berkeley Carroll thrive—from attracting and retaining exceptional educators to providing robust financial aid, to supporting arts, athletics, and innovative learning opportunities. These investments create more personal attention, deeper intellectual engagement, a rigorous and joyful education, and a community that truly knows every student.

Like most independent schools, tuition covers about 92% of Berkeley Carroll's operating revenue—but it does not fully fund the cost of a BC education. **Philanthropic support bridges the remaining gap of \$3,136 per student**, providing a vital, tax-deductible way for families, alumni, and community members to invest in our mission.

## What is the 2025–26 Annual Fund Goal?

We strive to raise **\$1.6 million** with the help from our entire community. Last year, families, alumni, grandparents, faculty, staff, and friends contributed \$1.45 million, directly benefiting our students and teachers. As operating costs continue to rise, a strong Annual Fund is essential to balancing the budget and sustaining the programs that make Berkeley Carroll exceptional.

## Why is participation in the Annual Fund so important?

High participation is a powerful vote of confidence—a clear sign that all parents and guardians invest in their children's education and believe in the School's mission. Participation rates also influence gifts from outside sources, as many foundations look for strong parent involvement before awarding grants. We ask each family to make a gift that is meaningful to them, regardless of size or giving level. Gifts range from \$10 to \$100,000 each year.

## What are BC's Giving Circles?

### Lion's Circle

\$25,000 and over

### Head of School Circle

\$10,000 to \$24,999

### Berkeley Circle

\$5,000 to \$9,999

*\*Gifts of \$5,000 or more to the Annual Fund are recognized as leadership contributions; these donors and lead volunteers are invited to a fall reception celebrating their generosity and impact.*

### Brownstone Circle

\$2,500 to \$4,999

### Sterling Circle

\$1,000 to \$2,499

### Friends Circle

Gifts to \$999

Add your gift now!



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## What does the Annual Fund support?

The Annual Fund covers all kinds of expenses at Berkeley Carroll, both expected and emergent, in every division. This includes, but is not limited to:

- Faculty and staff recruitment and retention
- Financial aid support for 24% of our families
- Professional development opportunities for educators that are reinvested into students through enhanced classroom instruction
- 35 Athletic Teams
- 17 Student Support and Wellness Specialists
- 14 safety and security professionals
- Hosting inspiring visiting speakers
- Fostering independence and confidence through bike riding and swimming in Kindergarten
- Curating experiential learning trips that take education beyond the classroom, like our Grade 8 trip to Chewonki, Maine
- Maintaining all spaces including:
  - **90+** classrooms
  - **Four** Libraries
  - **Three** play yards
  - **Two** full-size gyms
  - **One** swimming pool & **one** performance space

## What are the main ways to make a philanthropic impact at BC?

**Annual Fund** — Berkeley Carroll's most flexible form of support and the foundation of our fund-raising efforts. Running from July 1 to June 30, unrestricted gifts to the Annual Fund power our mission by fueling the School's operating budget and are put to work immediately where they are needed most.

**Endowment** — Our source of long-term strength and stability. The principal of an endowment gift is invested in perpetuity, while a portion of the annual interest income funds strategic priorities without reducing the core investment.

**Capital and Campaign Giving** — Major gifts that fund new facilities, major renovations, and sometimes endowment growth. According to NAIS best practices, these campaigns typically occur once or twice a decade, with pledges often payable over three to five years. While Berkeley Carroll is not currently running a capital campaign, we look forward to sharing future initiatives as they take shape.

**Planned Giving** — A gift vehicle—often a bequest, trust, or gift of real or personal property—that helps both the donor and the School. The donor reduces taxes, increases income, or satisfies another personal financial need. Berkeley Carroll receives a significant outright or deferred gift.

**Have more questions?** Please email [advancement@berkeleycarroll.org](mailto:advancement@berkeleycarroll.org), or contact Director of Advancement Emily Quay at [equay@berkeleycarroll.org](mailto:equay@berkeleycarroll.org).