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Report of the Headmaster

by Peter Laird Smick



As always at Waring, it was a busy year on almost every front. I am confident, however, that this 'busy-ness' was not the kind of business-as-usual, pro forma activity that leads to complacency and boredom. Rather, it was the intense, creative, Waring-style involvement of the truly engaged that left us all breathless but fulfilled at the end of the year.

Admissions & Enrollment

In spite of uncertain economic times, interest in Waring remained stable as measured by the size of our applicant pool. The number of completed applications actually rose somewhat from 63 to 69. Of these 69 completed applications 53 candidates were accepted. And from this pool of acceptances we enrolled 35 new students, bringing our enrollment to 150 as we began the 2008-09 school year. Though we did not reach our target enrollment of 152, we did recover fully from our slight dip in enrollment in 2007-08, which was brought on by a marked increase in attrition (defined as the total number of students leaving the school for any reason from September to September) during the 2006-07 admissions cycle. This past year's attrition of less than 5% is in line with our historical norms.

Our overall yield rate of 64%, or the percentage of accepted candidates who chose to enroll at Waring, did decline appreciably from that of the previous year. Though on the face of it we do not like to see a decline in yield rate, this number should be understood in context. First, our 2006-07 yield rate of 85% was at the very high end of its historical range. We, and most independent schools, just don't do much better than this, which made a drop in yield rate more likely from a statistical point of view. Second, our lower yield was limited almost entirely to the ninth grade where, as in past years, families are more likely to shop Waring against other schools. It is also noteworthy that most of the potential ninth-graders who elected not to enroll ended up choosing to attend public rather than private schools, where tuition was not a consideration. It is likely, therefore, that our decrease in yield rate during the past year reflects, at least to some degree, a reluctance on the part of families anticipating the increasing distress of the economy to make the long-term financial commitment of sending their children to private school. Given the marked economic downturn as we have begun the current school year, this obviously must be a concern in the 2008-09 admissions cycle.

On the positive side of the ledger, we are continuing to enroll a variety of highly capable and engaging students from a diversity of socioeconomic backgrounds who are choosing Waring for all the right reasons. And, as we have begun the new school year, it is clearly evident that the investment of our new students in the Waring mission and the challenges it entails has never been higher. This year three alumni children were included in the ranks of our incoming students: Grace Berntson (daughter of Chris Stodolski, '85), Adrien Hupin (son of Nicole Otis Hupin, '85), and Gabe Weedon (son of Jonathan Weedon, '86)—all 6th-graders.

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Annual Report

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JAN LINDSAY	MICHAEL ZARREN
*R.J. LYMAN	'94
DAVID MARSH	
ROBERT MCINNES	

* DENOTES NEW MEMBER

Together with our two alumni children who began last year—7th-grader Zak Vaneck (son of Robine Ralston Vaneck, '85) and 9th-grader Allison Hinrichs, (daughter of Stephen Hinrichs, '83)—we now have a total of five alumni children. A trend is surely in the making.

Though the economic outlook is discouraging, we are cautiously optimistic that we can maintain our current enrollment of 150 through the 2008-09 admissions cycle, even assuming a smaller than average influx of new students. The relatively small size of the senior class that will be graduating in May of 2009 provides a significant hedge against a drop in enrollment. With only 18 graduates, attrition in the range of 5%, and one student returning from a leave of absence, we can maintain an enrollment of 150 with only 25 new students enrolling for the 2009-10 school year, or 10 fewer new students than enrolled for 2008-09. Though inquiries from prospective students are so far down somewhat from last year, interest has remained fairly constant as we have begun our current admissions cycle, leading us to believe that our applicant pool will be large enough to provide a sufficient number of well-qualified candidates for the coming year.

Waring Admissions 2007-08

Inquiries (approx.)	282
Application process initiated	80
Completed applications (c)	69
Admitted (a)	53
Denied admission	15
Wait-list	1
Withdrew from process	3
Declined to enroll (d)	19
Yield rate [(a-d)÷a]	64%
Acceptance rate (a÷c)	77%

2007-2008 Enrollment	145
Graduates (5/08)	-22
Attrition	-7
New enrollment	+35
2008-09 Enrollment	150
2008-09 Target Enrollment	152

Student Body Profile

	Gp5	Gp4	Gp3	Gp2	Gp1	C7	C6	Total	(%)
Students	18	25	22	24	22	21	18	150	(100%)
Boys/Girls	7/11	10/15	9/13	8/16	11/11	9/12	12/6	66/84	(44%/56%)
Faculty-Staff	0	1	0	0	0	2	1	4	(3%)
Trustee	0	2	1	2	1	0	2	8	(5%)
Siblings	10	16	12	8	10	9	6	71	(47%)
Children of alumni	0	0	0	1	0	1	3	5	(3%)

Student to teacher ratio: 8:1 (approx. 7:1 when including music lessons)

2004-08 Financial Aid

	2004-05	2005-06	2006-07	2007-08	2008-09
Total # Receiving Aid	41	40	43	32	36
Percentage of Students	27%	27%	29%	22%	24%
Total Financial Aid	\$323K	\$343K	\$382K	\$355K	\$431K
Average Award	\$7,874	\$8,582	\$8,877	\$11,092	\$11,972

Class of 2008

When the 22 members of the Waring class of 2008 received their diplomas last May, the total number of Waring graduates rose to 417, virtually all of whom have gone through the

grueling college-application process in order to pursue their educational goals at four-year colleges and universities. Again this past year, high school graduates across the country faced a dauntingly competitive college admissions picture, with the number of applications up and acceptance rates continuing to drop. Our class of 2008 submitted 138 applications to 93 different colleges and universities, a new high in the number of different schools applied to by a class in a given year. Looking back over the last few years, this is part of a healthy trend that shows Waring students considering and applying to a wider and more diverse range of schools. The average number of applications per senior is up again this year from 5.9 applications per senior for the class of 2007 to 6.3 applications per senior for the class of 2008. For their efforts, the class of 2008 received 71 acceptances, 30 ‘wait-lists,’ and 37 denials of admission. These figures, particularly the acceptance numbers, are in line statistically with past years. We did see a modest drop in the number of denials while experiencing a modest increase in the number of ‘wait-lists,’ which probably reflects the much-discussed volatility of last year’s college admissions scene. Nine of the 16 members of the class who expressed a clear first-choice preference were accepted into their first-choice college. All members of the class of 2008 were accepted into college. Two members of the class have chosen some form of ‘gap’ program before commencing their college studies. Again in 2008, our graduates have distinguished themselves in their educational choices beyond Waring, an accomplishment made the more noteworthy by the selectivity of the schools to which they applied. Members of the Waring class of 2008 were accepted at the following colleges and universities. The schools that they are now, or will be, attending are in bold (Figures, where shown, indicate the number accepted or the number attending out of the number accepted.)

American University (2), Arizona State, Bard, Bennington, **Bryn Mawr**, **Boston University** (1/5), **Clark University**, Columbia College, Connecticut College, Dickinson, Elmira College, **Emerson** (1/2), Emory, Florida Institute of Technology, **George Washington** (1/2), **Gordon**, **Hampshire College** (1/2), Hartwick College, Hobart & Wm. Smith (2), Hofstra, Ithaca College (2), **Kenyon**, Macalester, Mary Washington, McDaniel College, Northeastern, Reed College, **RPI**, **St. Lawrence University**, **St. Michael’s College**, Sarah Lawrence, Skidmore (2), SUNY Binghamton, **Swarthmore**, Syracuse University, Temple University, **The New School**, Trinity (CT), **U. of Aberdeen**, U. of Colorado (2), **U. of Illinois**, **UMass Amherst** (1/3), UMass Lowell, **U. of Miami**, UNC Asheville, U. of Puget Sound, U. of Rochester, **USC**, **UVA**, **UVM** (2), U. of Strathclyde, **Vassar**, Villanova, Wake Forest, **Washington College** (MD).

Faculty and Staff Transitions

In keeping with the long-established continuity of the Waring faculty and administrative staff, there have been only two departures of salaried personnel during the past year, in both cases part-time teachers. Part-time Art teacher Jenelle Leclair, who was on an extended maternity leave after the birth of her first child in the spring of 2007 and is now expecting again, decided to retire from teaching in order to devote herself full-time to raising her young family. An aspiring young sculptor and dedicated long-distance runner, Jenelle joined the Waring faculty in the fall of 2003. During her years with us, Jenelle brought a willing and affirming spirit to everything she undertook, both in and outside of the studio. We will miss her warmth, dedication, and talent, but wish her the very best in her new undertakings, especially the challenge of raising two young children. Though part-time teacher Miriam Lawrence was with us for only a year, she made a lasting impression on the students in her Writing classes. An aspiring writer herself, Miriam had a knack for recognizing and drawing out the writer in others. We wish her well in her own writing projects as well as success in her graduate studies at the University of Michigan.

Michèle Mann joined our administrative team at the end of the summer in the capacity of interim Director of Development and Communications. She brings to the school a wide range of experience and expertise as a fund-raiser, having served as the Major Gifts Officer for the School of the Museum of Fine Arts and co-chaired the Capital Campaign of the Beverly Farms Library. Most recently, she directed a highly successful capital campaign for St. John’s Episcopal Church in Beverly Farms.

John Wigglesworth, chair of our Math/Science department, has been granted a full sabbatical

leave for the 2008-09 academic year. John is keeping himself busy following through on an ambitious sabbatical proposal that includes courses in upper level mathematics and physical science, observation of exemplary Math and Science programs in other schools, and, during the late spring and summer of 2009, sailing as an assistant scientist on an oceanographic research ship operated by the Woods Hole Oceanographic Institution. John, as everyone knows, is our resident sea captain. But, while much of his seagoing career has been in the deck department of small research vessels, this trip will take him off deck-duty and put him to work in the lab of a large research vessel. Because of his interest in earth science and ocean circulation systems, John hopes to join a cruise that will explore the Arctic Ocean, investigating the relationship between ocean circulation and climate change.

Dean of Faculty, Charles Newman, has been granted a 2/5, non-compensated, leave of absence for the 2008-09 academic year in order to pursue research and writing at the Boston Athenaeum. In effect, Charles is engaged at 3/5 of full-time during the current year, or three out of five days per week. During that time he is continuing to serve in the capacity of Dean of Faculty.

There are four new faces among the Waring faculty as we begin the 2008-09 academic year. Edith Day Fouser ('95) comes to us most recently from Salem State College where she served as a Lecturer in Geology and worked developing curriculum in the area of physical and environmental geology. After graduating from Waring in 1995, Edith pursued studies at The Colorado College from which she received her Bachelor of Arts degree with a major in Geology and a minor in Contemporary French Studies. She also holds an MS in Geology from Queen's University in Kingston, Ontario. In addition to her experience at Salem State, Edith has had a variety of professional experiences, including working at the McMurdo Station research center in Antarctica and serving as an outdoor education instructor in California and at the National Outdoor Leadership School (NOLS) based in Lander, Wyoming. Edith will be teaching primarily in the areas of Science and Math, though her wide interest in such things as writing, art, French, travel, and wilderness adventure will doubtless bring her into other Waring venues.

Joshua Scott-Fishburn, who will be teaching primarily in the areas of Humanities and Writing, is a graduate of Gordon College (BA, 1999). Joshua comes to us with experience teaching English at San Luis Obispo High School in his native California and at Essex Agricultural and Technical High School here in Massachusetts. From 2004 to 2006, he served as Program Coordinator and Resident Assistant for the Gordon-in-Orvieto Semester Program under the direction of Dr. John Skillen, now again a current Waring parent. He has also given on-site seminars and lectures in connection with Gordon's Jerusalem and Athens Forum. Joshua is currently a candidate for the degree of Master of Fine Arts at Seattle Pacific University, where he has completed his course work.

Taking Jenelle Leclair's place in our Art Department is Kristin Breiseth. Kristin is a graduate of Dartmouth College with a BA in Religion and Women's Studies and of California College of the Arts, where she completed a BFA majoring in Print-making. Kristin is a working artist and sole proprietor of a fine art and design studio located in Somerville. She is highly versatile, working in a variety of media, styles, techniques, and subjects. A rich sampling of her work can be viewed on her website at www.seeartbykb.com. Kristin is not only a passionate and accomplished maker of art, she is an equally impassioned and accomplished teacher of art. She taught art and served as advisor for independent study and A. P. candidates at Hamden Hall Country Day School from 1998 to 2006, when she reluctantly left teaching in order to devote herself to her art on a full-time basis. But, Kristin missed the opportunities for personal contact and inspiration that teaching affords and began looking for a part-time teaching position in a school that values art as an essential component of every student's program—in short, a school like Waring. It seems, in fact, that Kristin and Waring were looking for each other, and the rest, as they say, is history.

In keeping with the recommendations of the 2006 report of the Waring School Library Committee, we have appointed a Library Media Specialist to initiate the next phase in the development of our library program. Sarah Carlson-Lier holds a BA in English Language and Lit-

erature from Gordon College and a Masters degree in Library and Information Science from Simmons. She brings the experience of working in libraries in both the public and academic settings, including Endicott College, Gordon College, and Tufts University, where she served as a research assistant at the School of Nutrition Science and Policy. Most recently, Sarah has been serving as Program Coordinator of the Jerusalem and Athens Forum at Gordon College, where she will continue on a part-time basis while devoting the balance of her time to her new responsibilities at Waring.

Finally, I am happy to announce that after a brief, one-year retirement from the position of Athletic Director, Jan Lindsay has returned as our School Nurse and Athletic Trainer. It has become increasingly clear over the last few years that we need a staff person in these two important areas. That we could combine the two job descriptions in one position is most practical. That the person fulfilling that position has turned out to be Jan Lindsay is just sublime!

2007-08 Retrospective

Again during the past year, the Waring calendar has appeared to be what mathematicians refer to as “infinitely dense,” meaning that we always seem to be able to find a way to insert yet one more event in between two other events, no matter how small the space left between them. For those wishing to explore in detail the “infinite denseness” of the Waring academic year, I recommend this past year’s issues of Journal (Vol. 5, Nos. 1 & 2) as a starting point. These issues can be found in pdf format on the Waring website www.waringschool.org. For our purposes here, I would mention three areas of note.

• The Student Advisory Council

The 2007 revision of the Waring School Handbook provided for the establishment of Waring’s first ever “Student Advisory Council,” consisting of “six students in good academic standing from grades nine through twelve” plus the Waring representative to Student Government Day. The Handbook stipulates that there be one representative each from the 9th and 10th grades and two representatives each from the 11th and 12th grades. The Handbook further prescribes that these representatives are to be elected by their respective classes each fall to serve one-year terms ending when their successors are elected. As in the past, the student body and faculty elect the Waring representative to Student Government Day, which takes place at the State House in Boston every spring.

A primary role of the Student Advisory Committee is to furnish advice to the Faculty Discipline Committee when asked. Other roles include serving as a forum for the discussion of student concerns and as a means for voicing of those concerns to the faculty and administration. More broadly speaking, we hope that the Student Advisory Committee will serve as yet another avenue at Waring for the development of the kind of engaged citizenship that ultimately expresses itself in the true, Waring-style leadership of students who take responsibility for the well-being of others as well as for their own learning. But the Student Advisory Council is in its infancy and may well evolve roles and traditions that we cannot yet envision. Only time will tell the full story of this new departure.

Student Advisory Committee is under the supervision of Assistant Headmaster Dorothy Wang. The “charter” membership of the Committee, elected for the 2007-08 school year, consisted of Kimmy Stewart (9th), Emma MacLean (10th), Katherine Crowley (11th), Kelsey Pickering (11th), Karl Roth (12th), Silas Streeter (12th), and Tatiana Matthews (Student Government Day Representative).

• Professional Development of Faculty

One of the objectives of the Faculty and Staff Development Initiative that was set in motion a few years ago in response to goals articulated in our Strategic Plan of 2002 was to invest more deeply in the professional development of Waring’s faculty and staff. As a result, we have over the last few years significantly increased the funds set aside in our annual budget for professional development. Last year, in order to assure a more equitable distribution of this funding, we set up professional development accounts for each member of the faculty and administration. These accounts may be drawn on for professional development purposes by

means of a simple application process involving the signatures of the Dean of Faculty and the relevant department chair. The beginning balance of each account is the amount budgeted per faculty/staff member for the year. Funds not spent in one year may be carried over to the next year for up to three years, allowing faculty to accumulate funding for more expensive professional development opportunities. This approach gives greater transparency to the funding of professional development, allowing each applicant to keep track of his or her own funds and therefore to know ahead of time what funds are available. In addition to the professional development accounts, money is budgeted each year to fund professional development opportunities of special merit or value to the school that may exceed the funds currently available in a faculty member's account.

Faculty and staff have indicated their overwhelming approval of our system for disbursing professional development funds and are taking advantage of it on a regular basis. I would cite several noteworthy examples of professional development activity by our faculty during the past year. Last June, Math/Science teacher Stephen Bjork was invited to participate in the annual Westtown Seminar sponsored by David Mallery. As other Waring faculty who have participated in David Mallery events can attest, Westtown is the premier conference for teachers in the independent school world. In July, Allegra Smick, chair of the French and Core programs, spent several days at Tufts University attending "Music, Language, and the Mind," a conference devoted to the latest research on the neurological basis of music and language learning. Humanities and Writing teacher Josh Webb spent most of the summer in Asheville, North Carolina, where he completed the second of a four-year summer program towards his Master of Arts in Literature at Middlebury College's Bread Loaf School of English. Finally, Art Department chair Vicki Paret took a summer term studying pottery-making at the Haystack School on Deer Isle, Maine as Waring's first-ever recipient of an Allen Gordon Sanford Fellowship.

• **New Departures in Waring Travel**

The 2007-08 school year saw two significant departures from the norm in Waring travel programs. First, after eight years, including a one-year hiatus because of 9/11, our very successful exchange with the Lycée David d'Angers in Angers, France had to be suspended for one year because no replacement could be found for the retiring Denise Chevallier, who coordinated the French side of the program. So that last year's ninth-graders would not be disadvantaged by this temporary loss, program coordinator Allegra Smick arranged a substitute exchange with the Lycée St. Genès in Bordeaux. As a result, Group 2 spent the better part of a month in Bordeaux rather than Angers and did so in March rather than November, as has been our custom. Their French correspondents completed the exchange by coming to Beverly during End Term. Though different in certain respects from the Angers experience, the Bordeaux exchange proved worthwhile in every way and provided the essential elements needed to achieve the goals of this valuable program. The success of the Bordeaux exchange notwithstanding, Group 2 will be returning to Angers in 2008-09, as a new coordinator has been found to serve as Allegra's counterpart in France. It has been decided for a variety of reasons, however, to reverse our time-honored practice of going to Angers in the fall and hosting in the spring. As a result, Group 2 will be spending March in France again this coming year, including the two weeks of Spring Break.

The decision that the 2008 Junior Trip would not take place in France but in America was a major departure from past practice. This decision grew out of one of the recommendations of the 2006 report of the French Trip Review Committee that the administration and faculty review the French Trip and other Waring travel programs in relation to the school's mission, core values, and overall program priorities. This review affirmed our 'French Trip' model in most respects but recommended the idea of trying a more direct, one-to-one integration of the Waring academic program into the junior trip by making it into a culminating experience of a particular course, which would inevitably mean traveling to other destinations in addition to France. Though the broad, many-to-one integration and resonance of the Waring program within the French Trip has worked well over the years, the faculty felt that a more direct integration of specific course study into the trip would afford new opportunities to extend in-depth learning from the classroom into the field. The 2008 American Trip put this theory to the test with very positive results.

(CONTINUED ON PAGE 19)

Report of the Chair of the Board

by Andy Calkins

Imagine the following hypothetical scenario: You are a Waring School Trustee. You have overheard several conversations in which your child and other students discuss the drinking habits of a teacher. They feel he is often absent and/or hung over on Monday mornings, and his reputation as a heavy evening and weekend drinker is well established, at least among the students. What do you do?

- a) You report the accusations to the Headmaster.
- b) You tell the students that if they have real proof of their accusations they should speak to the head and if not, they are spreading rumors that are unfair and dangerous.
- c) You bring the accusations up at a Board meeting.
- d) You discuss the problem with the chair of the Board.
- e) You ask the students what proof they have, and then inform both the head and the chair of the conversation.

It's a little tricky, isn't it? Do you challenge the students? Probe a little to see if there is some ground to these rumors before taking them to anyone else? If you decide to raise the issue, what's the best way to do it? What's the appropriate Board role?

According to the National Association of Independent Schools (NAIS), which developed this and other hypothetical puzzlers for use in the training of independent school Trustees, the best response is (a). "The issue here," NAIS writes, "is the proper boundary between Board (governance, sets policy) and head (administration, in charge of day-to-day operations, including supervision of personnel). Board members should never place themselves in the position of assuming a quasi-administrative role, as would be intimated by counseling of the students or by probing for evidence. The head must be advised of such charges or rumors, and perhaps the Board chair as well (although good practice would dictate that the head routinely share such concerns with the Board chair)."

NAIS maintains an extensive library of short instructive case studies similar to the one above. The questions are hard and the answers are harder. The Waring Board of Trustees used many of these NAIS guides, this past year, as part of a self-assessment process that included an online survey that was taken by each Board member, reading and discussion of thoughtful writings on school governance by a range of experts, extensive interviews and an all-day retreat with an NAIS consultant with deep experience in independent schools, and the development of a set of governing principles for Waring (to which I'll return, later in this report).

As we are fond of saying around these parts: Here at Waring School, the learning never stops. That's as true for the Board as it is for students, teachers, administrators, and parents.

The mechanics and dynamics of school governance are fairly invisible to most members of the Waring community. That's actually a good thing. For most of us, if the school serves us well (as students, parents, faculty and staff, and even in the rear-view mirror, as alumni), and creates a compelling community for us to belong to, and pays its bills while striving to be affordable, and cuts the grass, we're okay with that. We lead busy lives and don't really need to know more.

But I devote space to this topic in the school's Annual Report for a reason. At some point in the four-to six-to twelve-year arc of a family's typical engagement with Waring, there will probably come a time when you *do* wish you knew more. You will become convinced that the school has made a grave mistake about something—a hiring, a math curriculum, an alcohol policy, a disciplinary action. A paint-color choice. Or you will feel generally troubled about something, the quality of theater productions, a discussion in your child's Tutorial, the design of the junior class trip. You may say to yourself: *This has to have action right at the top. I'm going to find a Trustee and take this to the Board.*

And, not to put too fine a point on it: You would be wrong.

Waring is unique in many ways—ways that are well known to all of us and don't need further comment here. We all love its uniqueness. In some respects we may sometimes be *too much* in love with its uniqueness. Governance is a case in point. There are 1400 independent schools in the United States. Each one of them, probably, takes some amount of pride in the uniqueness of something it does. That pride may even be justifiable when it is applied to its services to students, its learning model, its community spirit, the *je ne sais quoi* that makes one school feel different, the minute you step into it, from the next one.

But as our NAIS consultant, Marc Frankel, said to us this past year: When it comes to school governance, schools that pursue uniqueness over long-established best practice find themselves in messy situations that are, sadly, far from unique. We may, for example, think of Waring as an über-communicative kind of place—a community that uniquely values the ability to articulate ideas and concerns, the responsibility of speaking one's mind, and the importance of process in making good choices. We'd be right about all of that. But as the NAIS hypothetical that launched this report demonstrates, even uniquely communicative (we could just say *wordy*) cultures like ours need to find ways to channel communication flow so that it supports the overall effectiveness of the organization, rather than confuses it. That's why, if a parent were to bring a matter of school management—say, concern about the choice of math curriculum—to the attention of a Trustee at Waring, that parent would be encouraged to bring it up within the channels that have been created at the school in part for that purpose: The child's math teacher, or tutor, or the math department head, or the Assistant Head or Headmaster.

It's not that the Trustee doesn't actively want to be helpful. (Or that the Trustee wouldn't mention parental concern about some aspect of school life to Peter.) In fact, most Trustees—and I include myself in this category—have to learn to resist the impulse that comes most naturally to us: The impulse to be the problem-solver. We strive to be problem-solvers in most or all of the other compartments of our lives, and we are problem-solvers at Waring on matters that fall appropriately within the province of governance, not management: The mission and guiding assumptions of the school, and the organizational strategies we collectively pursue to deliver on that mission. But involving ourselves in matters that fall within the province of school management (such as choice of math curriculum, or personnel issues) would not, in fact, be helpful. Waring's school managers—Peter, Dorothy, and the staff—have over the years set up a whole range of structures and processes designed to make effective management and instructional decisions, with input as appropriate from members of the Waring community, and to answer questions whenever they arise. If Waring Trustees were to take it upon themselves to answer those questions or to serve as “problem-solvers,” it would send a confusing set of messages about who is managing the school (as opposed to who is governing it).

Part of the reason the Waring Board undertook the self-study this year and did the work with NAIS was to articulate more clearly and precisely the distinctive roles of governance and management at the school. We codified our own governance role in the form of two documents: The *Waring School Principles of Governance* for the Board as a whole, and (separately) for individual Trustees. Both of these documents were adapted from models developed out of decades and decades of best-practice research by NAIS. They are provided as an attachment to this report, and they are both available at www.waringschool.org.

Peter, Board Vice-Chair Geoff Hunt (who steered the self-study process and the development of the *Principles*), and I encourage you to read these two documents. They serve not only as useful guideposts for everyone in the Waring community today—including, obviously, the Trustees—but also as an important addition to the school's DNA, thinking about its next four decades and the years that will follow them. The more attentive we are to broadly-held standards of good governance, the better chance Waring will have of preserving and enhancing those aspects of our culture and learning model that make us unique.

Respectfully submitted,

Andy Calkins
Chair, Waring Board of Trustees

WARING SCHOOL BOARD OF TRUSTEES PRINCIPLES OF GOVERNANCE

The Waring School Board of Trustees is the guardian of the school’s mission. It is the Board’s responsibility to ensure that the mission is relevant and vital to the Waring community which it serves and to monitor the success of the school in fulfilling its mission. The Waring School Board of Trustees subscribes to the principles of good practice set forth by the National Association of Independent Schools. The principles of good practice, as adapted and shown below, describe the responsibilities of the Waring School Board of Trustees as a *body*. The Waring School Board of Trustees and the Waring School Headmaster work in partnership to fulfill these principles.

1. The Board adopts a clear statement of the school’s mission, vision, and strategic goals and establishes policies and plans consistent with this statement.
2. The Board reviews, maintains, and acts in accordance with appropriate bylaws that conform to legal requirements.
3. The Board assures that the school and the Board operate in compliance with applicable laws and regulations, minimizing exposure to legal action. The Board creates a conflict of interest policy that is reviewed with, and signed by, individual Trustees annually.
4. The Board accepts accountability for the long-term financial stability of the school, engaging in strategic financial planning, assuming primary responsibility for the preservation of capital assets and endowments, overseeing operating budgets, and participating actively in fundraising.
5. The Board selects, supports, nurtures, evaluates, and sets appropriate compensation for the head of school.
6. The Board recognizes that its primary work and focus are long-range and strategic.
7. The Board undertakes formal strategic planning on a periodic basis, sets annual goals related to the plan, and conducts annual written evaluations for the school, the head of school, and the Board itself against that plan.
8. The Board keeps full and accurate records of its meetings, committees, and policies and communicates its decisions widely, while keeping its deliberations confidential.
9. Board composition reflects the strategic expertise, resources, and perspectives (past, present, future) needed to achieve the mission and strategic objectives of the school.
10. The Board works to ensure all its members are actively involved in the work of the Board and its committees.
11. The Board conducts its work through committees, rather than as a committee of the whole. Committees are responsible for providing clear, complete, and timely information to the full Board in support of their recommendations. When committees make reports and recommendations to the full board, Trustees generally trust the quality of committee work and avoid duplicating the effort via a “committee of the whole.”
12. The Board engages proactively with the head of school in cultivating and maintaining good relations with school constituents as well as the broader community, and exhibits best practices relevant to equity and justice.
13. The Board is committed to a program of professional development that includes annual new Trustee orientation, ongoing Trustee education and evaluation, and Board leadership succession planning.

WARING SCHOOL PRINCIPLES OF GOVERNANCE FOR INDIVIDUAL TRUSTEES

The Waring School Board of Trustees is the guardian of the school’s mission. It is the board’s responsibility to ensure that the mission is relevant and vital to the Waring community which it serves and to monitor the success of the school in fulfilling its mission. The Waring School Board of Trustees subscribes to the principles of good practice set forth by the National Association of Independent Schools. The principles of good practice, as adapted and shown below, describe the responsibilities of the Waring School Board of Trustees as *individuals*. The Waring School Board of Trustees and the Waring School Headmaster work in partnership to fulfill these principles.

1. Waring School Trustees actively support and promote the school’s mission, vision, strategic goals, and policy positions.
2. Waring School Trustees contribute to the development program of the school, including strategic planning for development, financial support, and active involvement in annual and capital giving.
3. Waring School Trustees are knowledgeable about the school’s mission and goals, including its commitment to equity and justice, and represent them appropriately and accurately within the school and surrounding communities.
4. Waring School Trustees stay fully informed about current Board matters by attending Board meetings regularly, coming to meetings well-prepared, and participating fully.
5. The Waring School Board of Trustees sets policy and focuses on long-range and strategic issues. An individual Trustee does not become involved directly in specific management, personnel, or curricular issues, and should avoid engaging in such conversations with members of the school community.
6. Waring School Trustees, including those who are parents of children in the school, take care to separate the interests of the school from the specific needs of a particular child or constituency.
7. Waring School Trustees understand that the Board has one principal employee—the head of school—and that the head supervises all other personnel. Trustees should avoid conversations with school personnel that bypass this chain of command. Moreover, Trustees have an obligation to encourage school personnel and other members of the Waring community to use the appropriate channels of communication.
8. Waring School Trustees accept and support Board decisions. Once a decision has been made, the Board speaks as one voice.
9. Waring School Trustees keep all Board deliberations confidential.
10. Waring School Trustees guard against conflicts of interest, whether personal or business-related, and immediately report any such conflicts they might experience to the Board chairperson.
11. Waring School Trustees have the responsibility to support the school and its head and to demonstrate that support within the community.
12. Authority is vested in the Board as a whole. A Waring School Trustee who learns of an issue of importance to the school has the obligation to bring it to the head of school or to the Board chair, and must refrain from responding to the situation individually.
13. Each Waring Trustee, not just the treasurer and finance committee, has fiduciary responsibility to the school for sound financial management.
14. Waring School Trustees respect the committee system for dividing and apportioning the work of the board.

BUILDINGS & GROUNDS COMMITTEE

COMMITTEE MEMBERS 2007-2008

ANDREW ST. JOHN • CHAIR
PAM BASSO
DIANNE JIRKA

BEN RICHARDSON
PETER SMICK (EX OFFICIO)

2007-2008 Goals

- Support all Waring programs
- Continue implementation of deferred maintenance program
- Develop sustainable/green strategies

2007-2008 Activity

Overview

The Buildings and Grounds Committee is concerned with three categories of work, based on funding methods.

- Annual repair and maintenance (annual operating budget)
- Major repairs and deferred maintenance (Capital Improvement Reserve Fund)
- Major capital projects (capital campaign)

Annual Repair and Maintenance

The ongoing work of keeping the buildings running, clean, and dry is capably performed by Pavel and Dianne Jirka and their cleaners, with some help from outside contractors. In addition to general repairs, specific items include cleaning, mowing, snow plowing, painting, roof repair, and minor plumbing, heating and electrical repairs. In the last year general maintenance improvements have included:

- Painting the floors in the Gym locker room and the Theater
- Varnishing the Grande Salle floor
- Completing the reroofing and skylight repair of the School
- Repair of roofs and electrical equipment after a lightning strike
- Driveway repair at the Gym

Major Repairs and Deferred Maintenance (Capital Improvement Reserve Fund)

The CIRF was established to catch up with maintenance deferred over the years, to continue with major repair projects and to undertake specific improvements of limited scope. Projects initiated during 2007-2008:

- Repairing and refinishing the stucco at the House (ongoing)
- Installing new doors and crash bars in the Barn and Theater
- Insulating and caulking at the House
- New storage shed
- New bicycle rack and benches
- New planting at 38 Standley Street

Major Capital Projects

Major capital projects include new buildings or reconstruction, as for instance the School Building. Funding for these projects would be through a capital campaign. The Master Plan

review process established general priorities for the expansion of the School's facilities, and the Buildings and Grounds Committee is prepared at any time to take up the process again.

Greener Waring Initiative

In May, the Buildings & Grounds Committee sponsored a brainstorming meeting of students, faculty, staff, and interested community members to develop strategies for increasing Waring's activities around sustainability. Highlights included:

- John Wigglesworth reported on Waring's sustainability efforts to date.
- Tim Greiner's Group 1 students presented a study of Waring's carbon footprint. (Note: Waring produces emissions equivalent to thirty-three average houses. Emissions have decreased 7% over the last two years).
- Discussion centered around ways to decrease the carbon footprint, both by improving buildings and by changing behavior and habits.
- A statement of commitment to sustainable practice was drafted, for review by the Board of Trustees and potential inclusion in the school's guiding assumptions.

Projects & Goals for 2008-2009

- Improve campus image
 - Gym beautification
 - Redesigned entrance
- Continue to inventory Waring's use of energy, materials, water.
- Continue strategies for improvement—insulation, lighting, and mechanical retrofits.
- Develop suggestions for community resource efficiency (65° thermostat settings, Waring sweaters for every student, Hands to Work).
- Address pond filling-in.
- Complete repair of House and School courtyard stucco.

Respectfully submitted,

Andrew St. John

Committee Chair, 2007-08

F I N A N C E

C O M M I T T E E

COMMITTEE MEMBERS 2007-2008

GAR MORSE • CHAIR, JUNE 07-MARCH 08
GEOFFREY HUNT • CHAIR, MARCH-OCT 08
CAROLE GANZ
DAVID MARSH

SAM OTIS
BRUCE RAMSEY
BEN RICHARDSON
PETER SMICK (EX OFFICIO)

2007-08

Gar Morse, treasurer since 2004, retired from the Waring Board of Trustees and its treasurer in March. Geoffrey Hunt was appointed as treasurer through the fall Waring Corporation meeting in 2008, at which time Ben Richardson was elected treasurer (Hunt in turn was elected to Vice Chair of the Board of Trustees). The Finance Committee is grateful to Gar Morse for his faithful service and strong guidance and always timely advice over the financial affairs of Waring School.

In addition, three long-time members of the Finance Committee, Carole Ganz, Sam Otis and Bruce Ramsey, retired from the committee. We are also grateful for their considerable contributions, their candor, and wisdom.

The Finance Committee focused its efforts as follows: 1) continued to pursue financial stability and solvency through both a balanced budget for 2009 and monitoring actual financial performance throughout 2008; 2) took additional steps to analyze the overall management of the Waring School endowment; 3) converted the accounting and financial reporting system to a new software platform which will simplify financial reporting, enable administrative efficiencies and improve internal accounting controls; and 4) initiated extensive analyses and discussions surrounding financial sustainability in the years ahead.

Financial Results

The financial results for 2008 were in balance, that is, total revenues (primarily tuition supplemented by the annual fund and returns from the endowment), offset costs (expenses, special provisions and bond principal payments). The tuition increase for 2008-09 was 8%, a slight reduction from the prior year's increase but sufficient enough to allow for continued financial stability.

Submitted by,

Geoffrey P. Hunt

Committee Chair, March 2008-October 2008

C O M M I T T E E O N T R U S T E E S

COMMITTEE MEMBERS 2007-2008

JEFF AVERICK • CHAIR
BOB BROUDO
ANDY CALKINS
STEPHEN HINRICHS
GEOFFREY HUNT

BARBARA OSWALD
SAM OTIS
MALCOLM REID
PETER SMICK (EX OFFICIO)

Goals for 2007-08

- Complete the Board self-evaluation, review results to identify the Board's strengths and weaknesses, and take appropriate steps to improve the Board's effectiveness
- Cultivate and identify prospects for new Trustees, Corporation members, and officers
- Continue to clarify the role of Corporation members and identify opportunities to expand their involvement with and contributions to the school
- Clarify the Board's operating norms, with a particular focus on establishing a better understanding of the Board's governance role and guidelines for how Trustees should conduct themselves in their interactions with members of the school community.

Overview of 2007-08

Board Self-Evaluation:

The Board self-evaluation survey was completed by all Trustees and the Headmaster during the summer of 2007. Geoff Hunt and Stan Reczek, who coordinated the self-evaluation process, presented the results of the survey to the Board at a special meeting during the fall of 2007. Geoff and Stan had wisely selected NAIS's well-respected on-line Board Source survey instrument for this evaluation. One of the benefits of using Board Source was that the survey results included benchmark measures that allowed us to compare our Board's results with the survey results of other independent school boards throughout the country.

The survey indicated several areas for improvement and it was agreed that we would invite NAIS consultant Marc Frankel to help us review the results of our Board self-evaluation. Marc is on the Board of the NAIS and provides Headmaster/Trustee training for independent schools all across the country. He also designed and produced the NAIS program on how to debrief independent school boards on the results of Board Source evaluations. Marc reviewed our survey results and provided the Board with valuable feedback and recommendations at a "Governance Boot Camp" in early December 2007.

Based on Marc's recommendations, the Committee on Trustees drafted and the Board adopted Principles of Governance for individual Trustees and for the Board as a whole.

Headmaster Evaluation

The Committee on Trustees also performed a comprehensive Headmaster evaluation during the past year, using NAIS's on-line Headmaster survey instrument for the first time. Trustees Stephen Hinrichs, Ben Richardson, and Lindsay Diehl coordinated this activity.

Respectfully submitted,

Jeffrey Averick
Committee Chair, 2007-08

DEVELOPMENT

C O M M I T T E E

COMMITTEE MEMBERS 2007-2008

ANN LASMAN • CHAIR
STEVEN BJORK
CARIN DOBEN
CAROLE GANZ
STEPHEN HINRICHS
KITTY HUNT

DAN LASMAN
CHRISTINE MARANGELL
MICHÈLE MANN
PETER SMICK (EX OFFICIO)
KAREN STANTON
NEIL STANTON

Annual Fund

Karen and Neil Stanton, Chairs

Goals for 2007-08

- To raise \$200,000 in unrestricted funds for the Annual Fund for scholarship, financial aid, and professional development
- To continue to build contacts and relationships to increase the number of overall donors
- To continue to create cultivation opportunities that engage all constituencies
- To develop a statement that makes a compelling case to support the Annual Fund by articulating specific needs

Progress and Accomplishments

Annual Fund (Goal \$200,000):

Total Annual Giving (restricted and unrestricted):	\$265, 030
Total Annual Fund (unrestricted):	\$203, 780
Restricted Gifts:	
Art:	\$1,500.00
Athletics:	\$750.00
End Term:	\$1,500.00
Anonymous Gift:	\$45,000.00
Scholarship Endowment:	\$2,000.00
Professional Development	\$7,500.00

Participation levels continue to be strong:

Board of Trustees:	100%
Board of Overseers:	44%
Parents:	66%
Alumni:	8%

A Matching Gift Challenge was announced to the community last spring. The goal of this challenge was to raise \$50,000 of unrestricted funds. A matching fund of \$24,000 was created from second gifts from the Board of Trustees and select donors. The Waring community was then asked to donate and receive a 100% match. This appeal raised an additional \$28,000 totaling \$52,000 and surpassed the Annual Fund goal of \$200,000. We are indebted to the generous donors who initiated this challenge and to all who took up the challenge with such enthusiasm.

Appreciation events:

Several events including Grandparent's Day, Alumni Holiday Party, Volunteer Appreciation Luncheon, Major Donor Party, and Corporation Dinner, served to connect with constituencies and provide donor recognition.

Junior American Trip Auction:

- The Junior Class Auction and other fundraising raised a total of \$42,000
- The auction Chair for 2008-09 will be Kathy Bruce

Goals for 2008-09

Our ongoing goal is to strengthen and sustain the school community. This involves increasing donor participation, educating the community about the necessity of meeting fundraising goals, and having appropriate acknowledgement of those who help us meet these goals.

Our goals for the coming year are:

- To raise \$225,000 in unrestricted funds for the Annual Fund
- To continue to build contacts and relationships to increase the number of overall donors
- Continue to cultivate and steward major donors
- Increase percent participation among all constituents but particularly the Corporation and the Alumni
- Support a successful Junior Trip/Waring School Auction

The committee would like to recognize Stephen Bjork, Carin Doben, and Kitty Hunt, who are moving on to other pursuits. We would like to thank them for their commitment and generosity they have shown to the Waring School community as members of the Development Committee.

The committee would also like to express its profound appreciation for all those who donated time, money, and wisdom to development. In particular, we would like to thank Michèle Mann, Director of Development and Communications, who so adeptly leads and guides us to meet our development goals.

Respectfully submitted,

Stephen Hinrichs

Committee Chair, 2007-08

A C A D E M I C C O M M I T T E E

COMMITTEE MEMBERS 2007-2008

ANDY CALKINS • CHAIR
JEFF AVERICK
LINDSAY DIEHL
YASMINE FRASER
CAROLE GANZ
GEOFFREY HUNT

CHARLES NEWMAN
BARBARA OSWALD
PENNY RANDOLPH
KATIE BLAIR ST. JOHN
PETER SMICK (EX OFFICIO)

The Academic Committee, composed jointly of Trustees, Corporation members, faculty, and the Headmaster, focused its work in 2007-08 on several different matters relating to the school's academic program, as described below.

School Size

The Finance Committee produced some detailed analysis and modeling of the school's financial outlook under several different scenarios (varying enrollments, tuition increases, and cost ramifications). The Academic Committee was asked by the Headmaster and the Board to begin looking into the potential effects, both positive and potentially negative, of increasing the size of the school in order to ensure its continuing economic viability. This is a process that will continue over the coming year and, as it moves forward, will solicit input from a range of Waring community members as part of a larger strategic planning initiative.

Library, Media, and Information Resources

The committee met with library/media consultant Patricia Durisin Barbera regarding the follow-up to the work in 2006-7 by the Select Committee on Library, Media, and Information Resources. That committee developed a plan for the redesign of the way the school offers, organizes, and teaches the use of information resources across all media. There has been considerable work completed in many areas: upgrading internet search tools for faculty (and students); a library collection development plan; staff development on local library resources such as Noble and the databases offered by the Boston Public Library; and collaboration with teachers in Humanities and Science in incorporating more advanced research skills into class assignments.

Compensation

The Board completed its review of all forms of faculty compensation, including salary, additional compensation for extra responsibilities, benefits, retirement match, the sabbatical program, and tuition remission for faculty offspring. Geoff Hunt headed up the effort, supported by Katie-Blair St. John and Michael Zarren. The review included extensive interviews and surveys of faculty. Its goals are to ensure that Waring is offering a competitive compensation plan and arrive at a philosophy of compensation across the entire school staff.

Preliminary Goals for 2008-9

- Continue to explore program- and community-related impacts (positive and negative) of a potential enrollment increase of 10-20 students; assist in the development of the strategic planning process for the school, particularly with respect to this question of enrollment
- Take up the committee's earlier focus on internal and external validations of academic rigor and achievement and, jointly with the Headmaster and faculty, develop recommendations where appropriate

-
- Assist the headmaster as required in revising the Waring sabbatical policy and in completing related work on faculty/staff compensation and benefits
 - Review the need for attention (in the form of a Select Committee, or otherwise) to other areas of the Waring program and initiate these efforts as appropriate

Respectfully submitted,

Andy Calkins

Committee Chair, 2007-08

(Report of the Headmaster, continued from page 7)

The trip was linked to the Humanities course in American Studies that all juniors were taking last year. The teachers of that course—Charles Newman, Francis Schaeffer, and Jim Watras—were the primary leaders of the trip. Also serving as chaperones were former Athletic Director and Waring parent Jan Lindsay and current Waring parent Peg Howes, who filled in for Jan at the beginning of the trip. By all accounts, the 2008 American Trip was both a demanding and transforming experience of the kind that makes a life-long impression.

Challenge and Opportunity

Without question, these are challenging times, no less so for independent schools than for everyone else. But, as Yogi Berra is supposed to have said, “It’s tough to make predictions, especially about the future.” The impact of the current economic downturn on Waring’s future is indeed hard to predict. So much depends on the extent and duration of the economic crisis, both of which are unknowns at present. But, that there will be some impact is virtually certain. For independent schools, maintaining enrollment is the primary concern. And, as I have already indicated, I am cautiously optimistic about our enrollment prospects through the current admissions cycle. Beyond that, other factors come into play, such as long-term economic, social, and educational trends, regional demographics, and so on. It is clear that these factors must be considered as part of our on-going discussion of Waring’s long-term financial sustainability.

At this gut-check moment, when we have to face what one writer on independent schools has called “the brutal facts,” Patrick Bassett, President of the National Association of Independent Schools, reminds us that these “brutal facts” are offset by our “unshakeable beliefs.” He goes on to point out that these are grounded in “three indisputable virtues of independent schools.” The first is our “freedom to act quickly and decisively when needed” because we are independent of government and other affiliations in our governance and financial resources. The second is our capacity to act on the basis of intellectual, physical, and social capital that is “unmatched by any other segment of the K-12 education market.” The third is the confidence to act “knowing that history is on our side.” Bassett goes on to point out that independent schools are institutions built to last and that this is abundantly clear from the record: “For every ... calamity, man-made or God-delivered, independent schools have weathered the storm remarkably well.”

As for Waring’s future in the present climate of uncertainty, I subscribe to Pat Bassett’s prudent optimism. Yes, these are perilous times. But they are hopeful times as well. There is almost always opportunity to be found imbedded somewhere in crisis, if we know where to look for it.

Respectfully submitted,

Peter Laird Smick

Headmaster, Waring School

D O N O R S

2 0 0 7 - 2 0 0 8

We are grateful to each of our many donors listed below. Some names appear more than once in the list representing their various roles in the school. This list reflects the contributions received only during the Fiscal Year 2008: July 1, 2007 to June 30, 2008.

Annual Fund (Unrestricted)

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Andy Calkins
Lindsay Diehl
John Dineen (emeritus)
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Christine Marangell
Garlan Morse
Barbara Oswald
Sam Otis
Richard Prouty (emeritus)
Benjamin T. Richardson '93
Peter Laird Smick (ex officio)
Andrew St. John

Kitty Hunt
Jennifer Kirk
Mary Krull
R. J. Lyman
David Marsh
Robert McInnes
Christine Miller
Jody Morse
Danielle Otis '87
Tom Perkins
Penelope Randolph
Miranda Henry Russell '90
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Karen Stanton
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Sook Bin Woo Warner
Kim Wright
Harvey Zarren
Michael Zarren '94

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Martha Bednarz
James Behnke
Jamie Cabot
C. Richard Carlson
Pam Carlson
Deborah Cramer
Carin Doben
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Alice Woodman-Russell
Margaret Woodman-Russell
Dorothy Zarren
Michael Zarren
Abigail S. Zitin
Brita K. Zitin

2007-08 PARENTS

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Robert & Jill Ammerman
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Cindy Bates Valotto
Robine Ralston Vaneck & Thomas Vaneck
Robert VanderMolen & Kathryn Kowalski
Dorothy Wang & Karl Hemberger
John Wigglesworth & Priscilla Brooks

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Susan Slowick
Peter & Allegra Smick
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Thomas Vaneck
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James Watras
Joshua Webb '99
John Wigglesworth & Priscilla Brooks
Stéphanie Williams

PARENTS OF ALUMNI

Joseph & Amy Ahearn
Donald & Kristina Anderman
Jeffrey Averick & Helen Hoch
Joseph Levine & Martha Bednarz
Francis Saunders & Camilla Blackman
Robert Broudo
Bill & Gerrie Butman
Ann J. Cahill
Andrew & Peggy Calkins
Michael & Nancy Clasby
Deborah Cramer & Dan Greenbaum
Thomas & Diana Dawkins
Lindsay & Richard Diehl
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John & Susan Dineen
Carin & Douglas Doben
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