

Gifts That Give Back

A guide for independent school families on...

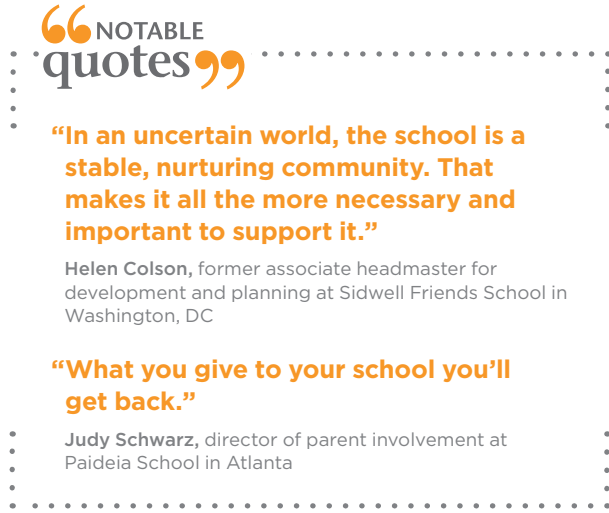
How **everybody wins**—including you—when you volunteer

Why schools ask for tuition **plus a gift**

What those **fund-raising appeals** are really asking for



National Association
of Independent Schools



“In an uncertain world, the school is a stable, nurturing community. That makes it all the more necessary and important to support it.”

Helen Colson, former associate headmaster for development and planning at Sidwell Friends School in Washington, DC

“What you give to your school you’ll get back.”

Judy Schwarz, director of parent involvement at Paideia School in Atlanta

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The National Association of Independent Schools provides services to more than 1,800 schools and associations of schools in the United States and abroad, including 1,500 nonprofit, private K-12 schools in the U.S. that are self-determining in mission and program and are governed by independent boards. NAIS works to empower independent schools and the students they serve.

For more information, visit the NAIS website at <http://www.nais.org>.

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The Gift of Time and Talent

When you volunteer, everybody—the school, your children, and you—will benefit. Here’s how.

“NOTABLE
quotes”

“To use a trite phrase, it takes a village. When you become a volunteer, you expand the village—you know other people you can rely on.”

Nicolette Templer Waldon, mother of three former students and former board member at Paideia School in Atlanta

“Volunteering is an opportunity. And when you think about it, why wouldn’t you want the opportunity to be involved in your children’s day-to-day activities? It keeps you connected.”

Karen Sullivan, mother of two former students and board member at Holy Trinity School in Richmond Hill, Ontario, Canada

It’s hard to imagine a more powerful team than school and parents working together for the good of children. That’s why serving as a parent volunteer is so vital to enriching your child’s education at an independent school.

How the school benefits seems obvious enough. Depending on the school’s needs, you may serve as a classroom aide, field trip chaperone, or creative consultant for plays or arts festivals. You may provide a helping hand at special events, such as athletic events or parent meetings. Or you may contribute your unique perspective to high-level decision-making as a board member.

But perhaps you never thought about why volunteering can be so beneficial to you as a parent.

For one thing, it lets you meet other parents who can give you deeper insights into the lives of your children and their classmates. (How much time do other kids spend on their homework? What projects and events are coming up that you haven't heard of? And when your child says, "Everybody else is doing it"—are they really?) Meeting fellow parents may also enhance your professional connections and personal friendships.

For another thing, volunteering lets you really get to know your child's school: who the staff and volunteer leaders are, why the school does what it does, and how the mission is carried out.

But perhaps most important, volunteering is an expression of your interest in, and commitment to, your child's daily life. Here's advice on how to make the most of volunteering for your school.

- **Start by volunteering for an existing task.** Don't leap in with your own project until you've found out what the school says it needs. True, you know your own child. But the school knows its own culture. Ideally, the school will make your proper role clear, including helping you distinguish between your positions as a parent and as a volunteer. Especially in the classroom, remember that you're there for the entire group, not just your child. (In fact, some schools find it problematic to have parents in the classroom. In this case, respect the decision and find other ways to participate.)

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“Your satisfaction with a school increases as your friendships with other parents increase. Many of my friends date back to my kids’ elementary grades, and we’ve all stayed close—so when our children are out with a gang of friends, we know who the gang members are.”

Nicolette Templer Waldon, mother of three former students and former board member at Paideia School in Atlanta

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“I feel very strongly that the inclination to volunteer and give back is not innate—it has to be learned, and it has to be learned from someone close to you. That’s why your kids need to see you paying it forward.”

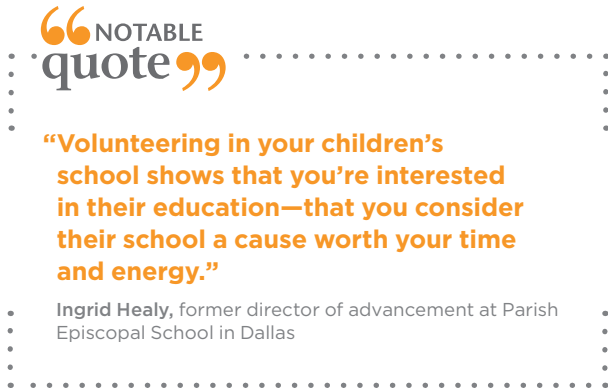
Judy Heisley Bishop, mother of three former students at St. Patrick’s Episcopal Day School in Washington, DC, and former trustee and member of its development and auction committees

- Avoid parent cliques.** Even if you arrive at the school already involved in a particular social circle, don’t limit yourself. Experiment with opportunities that put you in touch with a wide range of parents. In addition to broadening your experience, this will make you a role model for your kids.
- Shape your volunteering to fit your ability to pitch in.** Obviously, volunteering is difficult for two-career families with no time to contribute during the day. In this case, let the school know you’re interested in activities that take place outside of business hours or can be done from home. Or seek out a short-term project, such as hosting a dinner.

Participating is also a challenge if you’re the parent of boarding-school students. But perhaps you can volunteer for some aspect of parents’ weekend (which may include special projects), a winter carnival, or an alumni event in your hometown.
- Volunteer your expertise.** Many schools appreciate help from parents experienced with legal matters, real estate, or insurance. This kind of volunteering may be especially suitable for working and boarding-school parents.
- Consider the many ways to help with fund-raising.** This may be as simple as pitching in on the yearly auction, making annual fund calls for the phonathon, or serving on the development committee. Some parents even come to enjoy asking for money on behalf of a cause to which they feel committed. (Yes, really.)

- **Realize that as your children grow and change, so will your relationship to their school.** Through about fifth grade, it's a feather in a young student's cap to have parents around school to help in the classroom, chaperone field trips, and make scenery for the school play. But this delight may change to dread by seventh grade. Sometimes older kids no longer want to be seen with Mom and Dad, and the teachers no longer need help in the classroom.

The solution for parents who still want to be involved? Make the shift into school-wide activities, such as parent association meetings, the auction, or fund-raising.



The Gifts That Keep On Giving

Frequently *unasked* questions about why your independent school wants both tuition and a donation.

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“No independent school charges what it actually costs to teach a child. Most parents want their children to receive everything they can. The more you give, the more your children are going to receive.”

Herb Soles, campaign advisor at Norfolk Academy in Virginia

Q. Let's go right to the bottom line. My family is already paying tuition, and plenty of it. What does my child get when we donate money as well?

A. The bottom line is this: Your gift supports the people and programs that make your independent school so special. This means talented teachers. Small classes. Reading and math resources that many public schools simply can't afford. Up-to-date technology. Accommodations for different learning styles. And exceptional offerings in everything from the arts to athletics.

While your child is in school, all this translates into more personal attention, increased intellectual stimulation, better discipline, and more rigor. In the future, it will mean greater credibility behind the academic credentials your child will possess throughout life.

Gifts are necessary because tuition doesn't cover all the opportunities your student receives. That's why schools need endowments, auxiliary money-making activities such as summer camps, and, yes, fund-raising. Inevitably,

the special offerings that prepare students for the 21st century drive the budget up. So—just as universities and even public schools now do—your independent school must ask parents, grandparents, alumni, and friends for financial support.

Q. My child's school has beautiful grounds, lovely buildings, and many other pricey features. It sure doesn't look like it needs money. Why should I give?

A. It's easy to overestimate how affluent schools are. If they charge \$20,000 or more for tuition and enjoy attractive facilities, you may naturally assume that a school must be rich, the teachers are well paid, and the financial needs are minimal. But for the vast majority of independent schools, tuition does not cover the full cost of educating a child. In many boarding schools, tuition covers less than 70 percent of the educational costs. At most day schools in urban settings, tuition pays only 80 to 90 percent of the costs. That's why administrators often say that every independent school student attends on scholarship.

Q. If independent schools were run in a more businesslike way, couldn't they charge the full cost and avoid having to ask for gifts?

A. A for-profit business, whose mission is to make money, differs from a nonprofit school, whose mission is to provide children with a good education. By nature, high-quality schools are labor-intensive and people-oriented; on average, salary and benefits make up about 70 percent of a day school's budget and 60 percent of a boarding school's. These schools cannot get more efficient by combining classrooms or reducing staff. (And they probably wouldn't serve your best interest by "firing" inefficient students.)

What it comes down to is this: The rising cost of faculty salaries and benefits drives the cost of independent school education. Your school needs to pay its faculty members enough to enjoy middle-income lifestyles and support their families within a reasonable distance of the school. To offer competitive salaries and provide the programs you want your children to have, your school has to raise tuition, offer those summer camps, and ask you for a gift.

Q. How does financial aid fit into the fund-raising picture?

A. Your gifts help your school offer the financial aid that supports a diverse student body. True, many schools do not fund financial aid budgets directly

through donations. Instead, they usually allocate a set percentage of the expected tuition revenue. But without donations sufficient to meet operating costs, more tuition dollars would have to go to operations—leaving fewer dollars for financial aid. Your gifts make the school affordable to a wider range of students, bringing your child the many benefits of social and economic diversity.

Q. My school just announced a capital campaign. Why should I give for new buildings and programs the school won't offer until after my child graduates?

- A.** In any school that's more than 10 or 15 years old, parents of previous generations of students gave the money to fund the resources your child enjoys today. As the saying goes, all children are warmed by the fires built by others.

Correspondingly, it's up to you as a parent of today to help make sure that the school is there for children 10, 20, and 30 years from now. It's a pay-it-forward situation—you're paying dues to the future.

But there is also a more self-serving motivation. Your generous investment in the enhancements of tomorrow will build the school's long-term reputation, which will always benefit your child as an adult.

Q. Are there more reasons to give?

- A.** Of course. Many people take pride in the recognition that comes with appearing on the list of the school's supporters. Others enjoy being involved in fund-raising activities because it lets them make social contacts. Some view giving as a way to become active stakeholders who help their school achieve goals. And finally, unlike tuition payments, gifts to independent schools are tax deductible.

Q. How much of a difference can my gift make, really?

- A.** Your independent school has many fewer supporters than a university or a large charity does. Because the number who will give is small but the need is large, every gift counts more. This reasoning leads many families to make their children's school their philanthropic priority. They know their gifts are an investment that truly pays off.



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“When schools ask for money beyond tuition, they’re asking stakeholders to ensure that the best-trained, most committed adults are available to help students become everything they can be. Without that extra push financially from donors, virtually no school can achieve its goals.”

James McManus, executive director of the California Association of Independent Schools in Burbank

The Gift of Knowledge

Here's help cracking the code of fund-raising appeals.



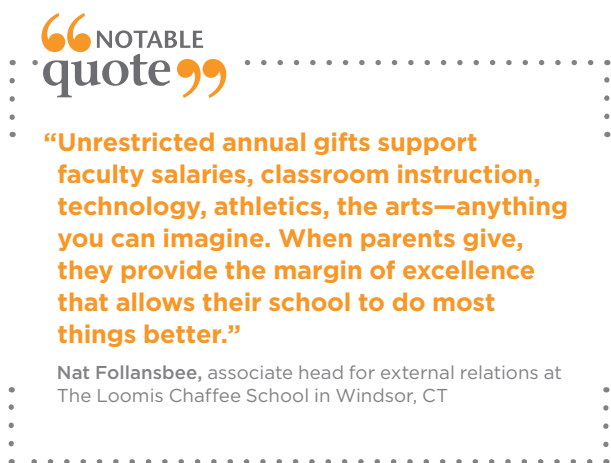
ANNUAL GIVING

What it is: Money for the school's current-year operating expenses. Annual gifts make up the difference between what tuition covers and the actual cost of running the school. Such gifts are usually unrestricted (meaning that donors allow the school to spend them on whatever it deems necessary) and almost never spent on items outside the operating budget.

Its practical equivalent: A checking account that helps the school accomplish its daily work.

What it buys: Teacher salaries and benefits, but also library acquisitions, teaching tools, educational technology and equipment, continuing education for staff, and such necessities as light bulbs.

Why the annual fund goal goes up each year: Because operating costs go up and the annual fund must help balance the budget.



CAPITAL GIVING

What it is: Major gifts to meet building and endowment needs the school cannot pay for out of tuition funds.

What it buys: Usually brick-and-mortar building projects—new facilities or major renovations—but sometimes endowment as well.

When you’ll be asked for a capital gift: Schools tend to conduct capital campaigns once or twice a decade. Because the needed gifts are large, you can usually pay your pledge over three to five years.

Why the school asks for an annual gift even while you’re making a capital gift: For the same reason you have to pay your mortgage while you’re putting an addition on your house. The school must continue to meet its operating costs even as it’s making major acquisitions and improvements.

ENDOWMENT GIVING

What it is: Major gifts to a fund that takes the pressure off the operating budget. Endowment principal remains intact as the school spends a percentage of the interest income. Established boarding schools with strong alumni donor bases tend to have larger endowments than day schools, though most day schools are working hard to increase theirs.

Its practical equivalent: A savings account. Most schools have a policy about how much endowment income they’ll spend each year so they don’t invade the principal.

What endowment giving buys: The security to invest in faculty compensation or new faculty positions (often called endowed chairs), funds for professional development, enriched academic programs and resources, and financial aid.

GIFTS IN KIND

What they are: Donations of needed goods and services rather than money.

What they could be: Vehicles, computers, musical instruments, carpentry, printing services, etc.

Caveat: Both schools and donors must approach gifts in kind with care. Schools must avoid accepting items that they can’t make good use of or that would cost too much to maintain or store (such as a boat). And because of the complicated rules and regulations about valuation and tax credits, you must be sure to consult a tax expert before giving.

LEADERSHIP GIFTS

What they are: Large donations that set the pace for giving at an early stage of an annual fund or capital campaign—although they may arrive at any time during a fund-raising effort.

Why they matter: Leadership gifts get a campaign off to a strong start and set an example of generosity for the entire community. Schools know that only a few families have the capacity to make substantial contributions toward a goal; if you’re among those few, you have a special opportunity to advance your school’s mission to transform lives.

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“Endowment is a gift for the long term that represents enormous trust in the school and its future. An endowment gift provides the school with budget flexibility and fiscal stability.”

Kathleen Kavanagh, former director of development at the Madeira School in McLean, VA, and Dana Hall School in Boston

MATCHING GIFTS

What they are: As an employee benefit, hundreds of companies worldwide—from Boeing to ExxonMobil to Microsoft—match their staff’s philanthropic contributions. Matching gifts allow you to double or even triple your gift to a school.

How they work: After confirming that your employer is indeed a matching gift corporation, get a matching gift form (usually from the human resources department), fill it out, and send it to the school with your gift. The school’s development office then submits the form to the company’s matching gift department, which sends the money directly to the school. (Also ask if your employer will match volunteer hours with a donation to your school, as some corporations do.)

PARTICIPATION

What it is: The percentage of parents who give a gift of any size to a school. All schools aim for 100 percent participation in the annual fund.

Why it’s so important: High participation is a huge vote of confidence, an important sign that virtually all parents invest in their children’s welfare and support the school’s mission. This percentage can also have an impact on gifts from outside sources; most foundations consider parent participation rates before donating funds to a school.

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“When I ask for donations to the annual fund, parents sometimes say, ‘But how can my \$10 or \$100 make a difference?’ I tell them it’s about participation. The money everyone gives is pooled together, and soon we have \$500,000—and the chance to update the science lab.”

Justin Coleman, director of development at Rolling Hills Preparatory and Renaissance Schools in San Pedro, CA



PLANNED GIVING

What it is: 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. The school receives a significant outright or deferred gift.

The ideal planned gift donors: Those who believe in giving back for the benefit of future generations; want to link a family name with the school in perpetuity; would like to commit to a bigger gift by combining an outright donation with deferred support; or will be able to make a larger gift at death than during their lifetimes.

Caveat: Before naming a school in your will or considering another kind of planned gift, consult with an attorney or financial advisor to explore the type of planned gift that is best for you and your family.

RESTRICTED AND UNRESTRICTED GIVING

What they are: Restricted gifts can be spent only for a specific purpose you choose, such as financial aid or a particular academic program. Unrestricted gifts can be spent where the school believes the need is greatest. At some schools, donors may ask to designate their unrestricted annual gifts to certain broad areas of current-year operating support, such as faculty compensation.

How to think about restricted and unrestricted giving: “An unrestricted gift is the highest form of philanthropy. It helps the school most because it shows you buy into the mission and gives the school the freedom to place the money where, in the wisdom of the board, it will serve the best purpose. This is not to discourage you from giving where your passion lies. But think broadly.”—*Tracy G. Savage, former assistant head of school for development and public relations at the National Cathedral School in Washington, DC*

Resources

To read more about volunteering and giving, consider these possibilities.

Forming a partnership with your child's school

- For a thoughtful statement about how to collaborate with a school for the good of your child, read “Parents Working with Schools/Schools Working with Parents,” part of the Principles of Good Practice series published by NAIS. Go to www.nais.org and search “Parents Working with Schools.”

Teaching the power of generosity

- “Part of your child’s education is learning how to give back, and parents are the greatest teachers of this,” says Regina Mooney, former director of institutional advancement at the Forest Ridge School of the Sacred Heart in Bellevue, WA. She recommends the Learning to Give website, which offers targeted information and activities for various age groups (including students and parents) about giving, volunteerism, and citizenship. See <http://learningtogive.org>

Learning how to double your dollars

- The most direct way to find out if your employer matches charitable gifts and volunteer hours is to ask your human resources office. But you can also ask members of your school’s fund-raising staff. If your company has a corporate giving program, the staff will be happy to help you learn how a small effort to obtain and fill out the correct forms can double or even triple the value of your gifts to the school.

Combining financial planning and giving

- *Wealth in Families* by Charles W. Collier (Harvard University, 2012) makes the point that just as children need to know about algebra and Shakespeare, they need to learn about financial planning and philanthropy. This insightful book offers guidance on how even families of modest means can think about financial decisions that will affect future generations and how to talk with children (at age-appropriate times) about all the issues surrounding a family's wealth.

For more details about this book, go to <http://alumni.harvard.edu> and search “Wealth in Families.”

- *Inspired Philanthropy: Your Step-by-Step Guide to Creating a Giving Plan and Leaving a Legacy* by Tracy Gary (Jossey-Bass, 2007) has a strong practical bent. It offers how-to's on everything from creating an intergenerational system of giving for your family to working with both nonprofits and your financial advisor. For a sampling of the book's exercises and worksheets, go here: www.inspiredphilanthropy.org/resources.htm

Understanding the school perspective

- If you liked Jim Collins' best-seller, *Good to Great: Why Some Companies Make the Leap...and Others Don't*, you might benefit from *Good to Great and the Social Sectors* (HarperCollins, 2005). After interviewing 100 leaders from the social sector, Collins concluded, “We must reject the idea—well-intentioned, but dead wrong—that the primary path to greatness in the social sectors is to become ‘more like a business.’” Get a taste of this slim (42-page) monograph by viewing related videos on Collins' website (http://www.jimcollins.com/media_topics/media.html#*socialSectors).
- *Handbook of Philanthropy at Independent Schools* by Helen A. Colson (NAIS, 2015) is widely considered the bible of school fund-raising. Its primary audience is development officers and school heads, but it nevertheless provides a broad overview from which trustees, fund-raising volunteers, and interested parents can benefit. Go to www.nais.org/bookstore and search “Handbook of Philanthropy at Independent Schools.”

Asking for gifts yourself

- “The Technique of Soliciting Funds,” a talk delivered by John D. Rockefeller Jr. in 1933, still inspires fund-raisers today. (Among its insights: “Never think you need to apologize for asking someone to give to a worthy objective, any more than as though you were giving him an opportunity to participate in a high-grade investment.”) To read the text, go to: <http://www.goettler.com/news-information/fund-raising/the-technique-of-soliciting>.
- Several brief, nuts-and-bolts training guides for volunteer solicitors are available from the Council for Advancement and Support of Education, a professional association for school and college fund-raisers. The booklets include “The Art of Asking,” “Winning Words,” and “Askophobia.” “Winning Words” features this thought from Winston Churchill: “We make a living by what we get, but we make a life by what we give.” For ordering information, see www.case.org/books/.

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“Schools hope that a community you’re
so involved in will be your priority for
giving.”

Barbara Kraus-Blackney, president of the Association of
Delaware Valley Independent Schools in Bryn Mawr, PA

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- **Karen Sullivan**, mother of two former students and board member at Holy Trinity School in Richmond Hill, Ontario, Canada
- **Nicolette Templer Waldon**, attorney, mother of three former students, and former board member at Paideia School in Atlanta

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“When you get involved with a school, you get a jewel of a reward—in terms of the satisfaction of contributing, the friendships you develop, the chance to be near your young children when they welcome you on campus and your older children when you can lurk in the corridors and take the pulse of what’s really going on....

“You get back what you give in many more ways than you ever anticipated.”

Nicolette Templer Waldon, mother of three former students and former board member at Paideia School in Atlanta

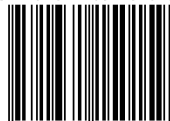


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