



Gifts That Give Back

A guide for independent school families on...

*how you (and your child)
benefit when you volunteer*

frequently unasked questions

*understanding the language
of fund raising*



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Editors: Nancy Raley and Karla Taylor
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"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



"Volunteering helps build the special community that is so important to independent schools."

Tracy Savage, former assistant head of school for development and public relations at National Cathedral School in Washington, DC

the gift of **time and talent**

How volunteering your time to the school helps you and your child—and how to make the most of the volunteer experience

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 the school auction or athletic events. 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 importantly, 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 child's independent 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, it's important to 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. If this is the case at your child's school, respect this decision and find other ways to participate.)
- ***Avoid getting stuck in a parent clique.*** Even if you arrive at the school already involved in a particular social circle, don't restrict yourself to that group. 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 desire to volunteer to your ability to pitch in.*** Obviously volunteering is difficult if yours is a two-career family 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 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.



"Too often parents assume that when there's a job to be done, someone else will do it. That's not true. That somebody else is you. And don't assume that if you're a working parent you can't participate."

Caroline L. Sargent, director of advancement at Far Brook School in Short Hills, NJ



"We couldn't exist without volunteers' is my favorite refrain."

Scott Griggs, head of Greenhill School in Addison, TX

- ***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 in which you can help with fund raising.*** This may be as simple as pitching in on the yearly auction, making annual fund calls as part of the phonathon, or serving as a member of 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 usually changes to dread by 7th grade. Most 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? Shift into school-wide activities, such as the auction or fund raising.

gifts that keep on giving

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



"You enrolled your child in an independent school because you were attracted to the excellent faculty and the small class sizes. You found excellence, and your gift allows you to help sustain it."

Mimi Baer, executive director of the California Association of Independent Schools in Santa Monica



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?



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. And exceptional offerings in everything from the arts to athletics. While your child is in school, all this translates to 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 gives your child access to more than you're paying for. That's why schools need an endowment, auxiliary money-making activities such as summer camps, and, yes, fund raising. Because a school's special resources drive the budget up, the school must turn to 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 many thousands of dollars 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 only about 70 percent of the educational costs, according to NAIS statistics. At most day schools, tuition pays approximately 80 percent of the costs. That's why administrators often say that to some degree, 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, is not an appropriate model for a school, whose mission is to provide children with a good education. By nature, high-quality schools are labor-intensive and people-oriented. They 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: Faculty salaries and benefits drive the cost of independent school education. Your school needs to pay its faculty members enough to enjoy a middle-income lifestyle and support a family 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

There are many schools that do not fund financial-aid budgets directly through donations. Instead, they usually allocate a set percentage of the expected tuition revenue. But without donations suf-

efficient 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 be able to 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. Financing 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 being listed among the school's supporters. Others enjoy being involved in fund-raising activities because it lets them make social contacts. 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 community 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 truly matter.

the gift of knowledge

The language of fund raising demystified



“Not everybody can give. But for those who can, it’s so important to bridge the gap between what it really costs just to run the school and what it costs to have the best possible teachers and programs.”

Suzanne Glatt, mother of first- and third-graders and current-parent chair of the capital campaign at Far Brook School in Short Hills, NJ

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 the 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.

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. Long-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 it 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. These could be vehicles, computers, musical instruments, carpentry, printing services, etc.

Caveat: 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 with a tax expert before giving.

MATCHING GIFTS

What they are: As an employee benefit, more than 550 American corporations match their staff's philanthropic contributions. Matching gifts allow you to double or 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 check directly to the school.

PARTICIPATION

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

Why it's so important: High participation is a vote of confidence, a sign that 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 agreeing to donate funds to a school.

PLANNED GIVING

What it is: A gift vehicle that allows you to donate via a trust, annuity, insurance policy, or, most commonly, a bequest.

Its practical equivalent: A retirement account—money to secure the future.

The ideal planned gift donors: Those in their 60s, 70s, or 80s who believe in giving back for the benefit of future generations, want

to leave something as a link to posterity, or can make a bigger gift in 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 adviser to explore what type of planned gift 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 designate, such as financial aid or a particular academic program. Unrestricted gifts can be spent where the school believes the need is greatest.

How to think about restricted and unrestricted giving: “An unrestricted gift is the highest form of philanthropy. It helps the school most because it 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 Savage, former assistant head of school for development and public relations at National Cathedral School in Washington, DC



“An annual fund gift honors your children’s teachers.”

Richard O. Walker III, director of development at The Landon School in Bethesda, MD



“Remember, no buildings come from tuition.”

Scott Griggs, head of Greenhill School in Addison, TX

resources

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

Forming a partnership with your child's school

- “Principles of Good Practice for Parents and Independent Schools” is a thoughtful statement of how parents and schools can work together for the good of students. Originally published by the Association of Independent Maryland Schools, it has since been adopted by other state independent school associations. See www.aimsmd.org/upload/ParentStatement-pdf.pdf.

Financial planning and giving

- *Wealth in Families* by Charles W. Collier (Harvard University, 2001). 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.

To see an interview with Collier (Harvard's senior philanthropic adviser), go to www.haa.harvard.edu/devel/html/capitalideas_interview.html.

- *The Generosity Factor: The Power in Holding Things with Open Hands* by Ken Blanchard and S. Truett Cathy (Zondervan Publishing House, 2002). A contemporary allegory about the importance of giving money and time.

Understanding the school perspective

- “Working on Nonprofit Boards: Don't Assume the Shoe Fits” by F. Warren McFarlan. Although it was written for businesspeople who want to translate their corporate board experience to nonprofit service, this reprint from the November/December 1999 *Harvard Business Review* explains why business principles don't necessarily apply to nonprofit organizations such as schools. To download a copy (for a small fee), search for Reprint 99608 at www.hbr.org.

- *Philanthropy at Independent Schools* by Helen A. Colson (NAIS, 2002) is widely considered the bible of school fund raising. Though its intended audience is school heads, development officers, and trustees, it provides a broad overview from which fund-raising volunteers or interested parents could benefit.

Asking for gifts yourself

- “The Technique of Soliciting,” 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 object, any more than as though you were giving him an opportunity to participate in a high-grade investment.”) To download a free copy, see www.ohiodems.org/young/resources/YDAfundraising.doc.
- 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,” “Askophobia,” and “It’s Your Call” (specifically for phonathon callers). “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/.



“No matter what the size of your gift—\$10 or \$10 million—it’s philanthropy, and it’s a great example for your kids.”

Kathleen Kavanagh, former director of development at The Madeira School in Greenway, VA



“At a university, it takes a lot of money to make a difference with your gift. At a school, even a small gift has a big impact.”

Anne Beedy, director of development at New Hampton School in New Hampton, NH

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- Richard O. Walker III, director of development at The Landon School in Bethesda, MD



"The more you get involved, the more satisfying it is."

Leslie Hunter, mother of three students and board member at Marin Country Day School in Corte Madera, CA



NATIONAL ASSOCIATION OF INDEPENDENT SCHOOLS

1620 L Street, N.W., Suite 1100
Washington, DC 20036-5605
www.nais.org (202) 973-9700