



Heathwood Hall Episcopal School's 2011-12 Annual Fund Overview

The Annual Fund is part of the fabric of any good independent school. An Annual Fund is designed to fortify the expanding program and the operational needs of the school. Heathwood Hall's Annual Fund supports our greatest priorities, our faculty and students. The Annual Fund plays a critical role in closing the gap between tuition revenue and the actual cost of a Heathwood education.

Giving Societies

The Heathwood Circle and The 1951 society are the annual fund giving societies celebrated at Heathwood Hall Episcopal School. The name of these societies came from the vision our founding members had almost 60 years ago in the Heath Mansion. What began in a house, on **Heathwood Circle**, continues to grow and be a home for education on our beautiful 133 acre campus.

The Heathwood Circle, is a new annual fund giving society adopted by the Stewardship Committee of the Board of Trustees. This society was created to encourage the Heathwood community to have 100% participation to the annual fund. Everyone who participates is a member.



The 1951 society is a long standing annual fund giving society that was created based on level of giving. Heathwood Hall Episcopal School was founded in the year 1951 and those that give at the 1951 level or above are honored through this group.



Both of these societies are of equal importance. Participation is an ultimate goal as it shows the health of the school when its members come together to reach 100%. Level of giving is important as this is a part of the predicted operating budget and when parents give to their maximum ability it again shows they are happy at the school.



Frequently Asked Questions about the Annual Fund

Q: Why does Heathwood Hall need an Annual Fund?

The Annual Fund is part of the fabric of any independent school. An Annual Fund is designed to fortify the expanding program and the operational needs of the school. Heathwood Hall's Annual Fund supports our greatest priorities, our faculty and students. The Annual Fund plays a critical role in closing the gap between tuition revenue and the actual cost of a Heathwood education. The Annual Fund is an opportunity for parents, alumni, grandparents, parents of alumni, and friends to support teaching and learning —what goes on at the school every day. A contribution to the Annual Fund is the first gift we ask of every alumnus, parent, and friend. Gifts to the Annual Fund may be tax-deductible.

Gifts to the Annual Fund make the following possible:

- Innovative and challenging academic, athletic, and arts programs
- Recruitment of highly talented faculty by offering competitive salaries and benefits
- Small class sizes designed to give teachers the opportunity to show individual attention
- Professional development opportunities for our faculty
- Art supplies and books and resource materials for the library
- Multi-faceted athletics and activities such as clubs to develop student interests

Q: Is 100% parent and community participation really that important?

A: YES! Getting 100% participation in the Annual Fund is as important as meeting our overall financial goal. Before outside funding sources such as foundations will consider donating their dollars to Heathwood, they want to know that Heathwood families, faculty, Board members, and staff are supporters as well. **After all, if the people who directly benefit are not willing to support the school, why would outsiders want to do so?** With the increasingly competitive philanthropic market in Columbia, showing a high percentage of participation in the Annual Fund is extremely important. For that reason, it is really true that every gift counts. Regardless of size, your contribution to the Annual Fund makes a powerful statement to foundations and outside donors who



look for strong participation from the school community as they make giving decisions. **The only gift that is too small is no gift at all.**

Q: Independent schools are expensive. Why must money be raised every year in addition to tuition?

A: To broaden accessibility, Heathwood sets tuition at about 90% percent of the cost of educating each student. The school relies on the Annual Fund, other contributions, and income from endowment to help provide program enhancement and bridge the gap between tuition income and operating expenses. The qualities we value most about a Heathwood's education: a dedicated, well-trained faculty; quality academic standards; a rich mix of extracurricular activities; individual attention; appropriate and accessible equipment ... are all expensive.

Gifts to the Annual Fund promote accessibility by helping to balance the budget, while enabling Heathwood to attract the best faculty and to compete for talented students.

Q: Should I give to a specific program?

A: Annual Fund gifts are generally unrestricted so they can be used wherever the need is greatest. Annual Fund dollars are at work in every classroom, benefiting every student.

Q: Can I pay my pledge with appreciated securities?

A: You may transfer appreciated securities to Heathwood making it possible to receive the fair market value of appreciated securities at the time the gift is made, while avoiding capital gains tax in the appreciated value of the stock. Please call the Development Office at (803) 231-7734 for information.

Q: What is a matching gift?

A: Matching gifts are often available from employer's matching gift programs. Please take the time to ask your Human Resources Office if your employer has one. The contribution from your or your spouse's employer will qualify you for membership in higher giving clubs.

Q: Why not run the school like a business and charge the full cost for the services provided?

A: A school, whose primary mission is to provide children with a good education, cannot be compared to a business, whose primary mission is to make money. By their very nature, excellent schools are labor-intensive and people-oriented. Moreover, the costs of faculty salaries and benefits to a large degree drive the cost of an independent school education. In order to offer competitive salaries to faculty and staff and



to provide desirable programs, Heathwood has to do the following: raise tuition; offer summer camps, after-school care, and extracurricular activities; pursue corporate and foundation gifts; and ask you for a gift.

Q: How do I make my donation?

A: Making a donation is easy. You can give online by visiting www.heathwood.org and clicking on “Giving,” or contact Ethel Bunch in our Development Office at bunche@heathwood.org/(803)231-7734. You can give by check, credit card, stock or matching gift.

Q: What is the difference between an Annual Fund Campaign Gift and a Capital Campaign Gift?

A: Like many organizations, Heathwood has long-term and short-term goals that are met through various fundraising efforts. Annual gifts are raised each year from alumni, parents, faculty and friends of Heathwood Hall and spent within the same fiscal year. Annual gifts help provide funds to many of the programs and priorities on campus that do not receive regular designated support. They are the most important gift a school asks of their community.

A capital gift is normally a larger, one-time gift that goes toward projects like new buildings, endowing funds for new professorships, or increasing the general endowment.

Donors are asked to make a gift to the Annual Fund first, before determining their capital and endowment giving plans.