



# Parent Giving Guide

*A co-educational, Episcopal School, Palmer Trinity occupies 55 acres of tranquil and beautiful open space. The School is dedicated to preparing its students to lead purposeful and meaningful lives.*

Palmer Trinity is committed to diversity and includes students with a range of academic interests, as well as students from diverse ethnic, religious, and socio-economic backgrounds.

Rooted in the traditions of our predecessor schools, Palmer School (founded in 1972) and Trinity Episcopal School (founded in 1983), Palmer Trinity inherited a proud history of strong governance, generous support, and educational excellence.

Today, we are poised to provide the next level of excellence, and to increase the opportunities for students to soar to greater heights.

PALMER TRINITY SCHOOL



Palmer Trinity is an **Independent School**. By definition, an Independent School “is a school that is organized as a not-for-profit and is governed by a self-perpetuating board of trustees as opposed to being owned and run by the government (public schools), by a diocese (parochial school), or by for profit entities; it is not dependent upon national or local government for financing its operations, nor reliant on taxpayer contributions, and is instead funded by a **combination of tuition charges and donations.**”



## Frequently *unasked* questions about why Palmer Trinity School needs both tuition and a donation.

**Q: 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 Palmer Trinity so special. This means talented teachers, small classes, up-to-date technology, 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 child receives. That's why schools need endowments, auxiliary moneymaking activities such as summer camps, and, yes, fund-raising. Inevitably, the special offerings that prepare students for the 21<sup>st</sup> century drive the budget up. So—just as universities and even public schools now do—Palmer Trinity must ask parents, grandparents, alumni, and friends for financial support.

**Q: Palmer Trinity 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 \$40,000 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.

**Q: How much should I give to the Annual Fund?**

**A:** We ask each family to consider giving at a level that is personally significant to them. Our giving levels are featured on the back of this brochure, and our hope is that each family will join a Leadership Circle level that best exemplifies their capacity to give.

**Q: When should I make my Annual Fund gift or pledge?**

**A:** To maximize the annual influence of our community's generosity, we ask that you consider making your gift during our Fall Annual Fund Drive. Although the fiscal year ends June 30, early commitment to the Annual Fund puts PTS in a great position to allocate resources for our children.

**Q: If Palmer Trinity 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, does not align with a school whose mission is to provide children with an exceptional education. By nature, high-quality schools are labor-intensive and people-oriented. These schools cannot get more efficient by combining classrooms or reducing staff.

It comes down to this: The rising cost of faculty salaries and benefits drives the cost of independent school education. Palmer Trinity needs to pay its faculty members enough to enjoy middle-income lifestyles and support their families. To offer competitive salaries and provide the programs you want your children to have, Palmer Trinity 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:** The Annual Fund allows Palmer Trinity to offer the financial aid that supports a diverse student body. 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 Palmer Trinity 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 alumnus.

**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 donor honor roll. Others enjoy being involved in fundraising 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:** Palmer Trinity has 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 Palmer Trinity their philanthropic priority. They know their gifts are an investment that truly pays off. Moreover, your participation in the Annual Fund helps build pride in our school and illustrates institutional strength to the greater community.



*“Giving to the Annual Fund is a way to express our gratitude for all that Palmer Trinity School gives us. It is also our commitment to Palmer Trinity School’s future. Marine Lab in Sixth Grade and Lakes, Ropes & Stars in Seventh Grade, both at no cost, were a couple of the numerous “gifts” the Annual Fund underwrites. Every family is encouraged to contribute towards the annual fund according to their capacity.”*

– PARENT

# Donating 101

## ANNUAL GIVING

**What it is:** Money for the School's current-year operating expenses. Annual gifts supplement the operating budget and allows the School the ability to do more than what tuition covers. 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 experiential learning programs, teaching tools, educational technology and equipment, and continuing education for staff.

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

**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 fundraising effort. There are five levels of Leadership Giving for the Palmer Trinity Annual Fund, and they are outlined on the back of this guide.

**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.

## MATCHING GIFTS

**What they are:** As an employee benefit, more than 1,560 American parent companies—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 check 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% 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.

## **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.

## **UNRESTRICTED GIVING**

**What is unrestricted giving?:** Donations made to the Annual Fund are considered “unrestricted gifts”, because the school can invest the dollars where it is needed the most. Every year, these unrestricted donations demonstrate the community's faith in the direction of the School, and empower our students and faculty.

**How to think about 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.



*At Palmer Trinity School, we encourage you to take an active role in your child(ren)'s educational life. The Palmer Trinity Parents Association (PTPA) is a volunteer organization of parents who want to support the mission of Palmer Trinity School.*

*The PTPA provides an organized structure and forum for all its volunteers, encouraging positive involvement in school life through meaningful programs and services.*



## Other *Ways* to Support the Development Office

### **Annual Fund Committee**

The Annual Fund allows our school to fulfill the academic plan budgeted for each school year. As with most independent schools, the tuition alone at Palmer Trinity School does not cover the cost of educating our children, and the Annual Fund provides the resources needed to meet our budget so that Palmer Trinity can continue to provide the highest level of academics, equip classrooms with technology and innovative educational aids, and hire and retain the best teachers. If you would like to help spread the word about the importance of the Annual Fund, you can become an Annual Fund Ambassador and join a group of dedicated parents who want to make a difference.

### **Sandy Golf & Tennis Tournament Committee**

Sandy Block was a former PTS parent and an active Board member. Aspiring to honor his father's memory, Chris Block '96 founded this tournament. This day-long fundraising event includes golf and tennis tournaments, dinner, and auction. The committee will work closely with the School's Development team to organize, plan, and orchestrate all the activities. Proceeds are allocated to the Sandy Block Financial Aid Award, which allows outstanding need-based students to attend Palmer Trinity School.

### **International Festival Committee**

Palmer Trinity School's signature event, the International Festival, celebrates our vibrant multicultural community and highlights the School's commitment to multiculturalism. This committee is responsible for planning, organizing, and orchestrating the Festival which showcases all that makes this community a dynamic international crossroad. The Festival is a day-long event that unites our Palmer Trinity family with the community at large. This is a day that celebrates our diversity with musical performances, art exhibits, food booths, a handicrafts bazaar, and various games and activities from around the world.

*"From even small efforts, there are so many benefits to being involved at your child's school: enhanced educational opportunities, getting to know your child's friends, teachers, and coaches, and feeling good about making a difference. One reward people don't always mention is that it can be fun! Supporting activities at Palmer Trinity School may be some work, but because there is such an amazing community of families, teachers and staff, it is always worthwhile AND a great time."*

– PARENT

## SUGGESTED GIVING LEVELS

### – Leadership Circle –

Founder's Circle \$50,000+

Golden Falcon Circle \$25,000-\$49,999

Rose Palmer O'Neil Circle \$10,000-\$24,999

R. Hardy Matheson Circle \$5,000-\$9,999

Head of School Circle \$2,500-\$4,999

### – Palmer Trinity Friend –

Virginia and William Hester Circle \$1,000-\$2,499

Robert M. Yarbrough Circle up to \$999

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## Thank You

Annual Fund gifts touch every student, every faculty member, and every corner of our school. Every donation, no matter the size, makes it all possible.

To donate online, please visit  
[www.palmertrinity.org/give](http://www.palmertrinity.org/give)



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