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## 2010-11 Annual Fund Common Questions and Facts

### FACTS & FIGURES

#### 2009-10 Annual Fund

- 2009-10 Annual Fund Goal: \$850,000
- 2009-10 Annual Fund Total Raised: \$930,000
- 96% of the parents participated, donating \$782,128+ (84% of all funds raised)
- Gifts to the 2009-10 Annual Fund ranged from \$5 to \$50,000

#### 2008-09 Annual Fund

- 2008-09 Annual Fund Goal: \$825,000
- 2008-09 Annual Fund Total Raised: \$829,000
- 95% of the parents participated, donating \$688,555+ (83% of all funds raised)

#### 2007-08 Annual Fund

- 2007-08 Annual Fund Goal: \$800,000
- 2007-08 Annual Fund Total Received: \$885,955
- 95% of the parents participated, donating \$700,572+ (80% of all funds raised)

#### What are Urban's sources of income?

- 89% from tuition and fees
- 10% from charitable gifts (primarily the Annual Fund)
- 1% from interest and other restricted funds

### COMMON QUESTIONS

#### How does the Annual Fund work?

Every fall, parent volunteers ask fellow parents — through mailings, phonathons and in person — for an annual contribution. We also ask alumni, alumni parents, grandparents, faculty, staff, trustees and friends for contributions to the Annual Fund.

Annual Fund contributions, which are 100% tax deductible, usually come in the form of gifts and pledges. Pledges can be paid all at once or through several payments over the year. We ask that donors specify a payment schedule at the time they make their pledge so that the Development Office can send reminders as needed. Donors can also submit a credit card number with the desired pledge schedule to have payments automatically processed. Because Urban's Fiscal Year ends on June 30, we ask that all Annual Fund pledges be paid by June 15.

**Every gift, regardless of its size, is important to Urban. We ask each family to participate at a level appropriate to their circumstances, and encourage them to make Urban their highest philanthropic priority while their children are students here.**

**Furthermore, because Urban is a small school, and there are fewer parents to ask for support, it's especially important that those families who are able to make leadership gifts step up. Leadership gifts (gap and above) make a huge difference – in fact, last year they accounted for nearly 80% of all funds raised.**

### **What are methods of giving to Urban?**

Gifts of cash are the most common form of support. Checks should be made payable to The Urban School of San Francisco. Urban also accepts VISA, MasterCard or American Express. Gifts can also be securely made online through our website at [www.urbanschool.org/giving](http://www.urbanschool.org/giving).

### **Can companies match a gift to Urban?**

Many employee donations also qualify for corporate matches. The donor should obtain a matching gift form from their company, fill it in where required, and mail it to the Development Office with their gift.

### **What if a donor would like to give securities/stock?**

The donor should alert the Development Office prior to making the transfer of securities. Instructions for making a gift of securities are posted on our website under "Ways of Giving" which you can click on by dragging your mouse over "Support Urban" on our homepage. Urban holds accounts with Charles Schwab and Morgan Stanley.

### **What does the Annual Fund support?**

This year, contributions to the Annual Fund will comprise 10 percent of Urban's operating budget, as tuition alone does not cover the total cost of an Urban education. The Annual Fund does not pay for "extras" or discretionary items, but helps cover the day-to-day costs of the academic program, faculty compensation, financial aid, projects and field trips, the arts, athletics, outdoor trips and more.

### **What does Urban pay our teachers?**

Urban's faculty salary scale ranges from approximately \$45,000 to \$90,000 and includes 20 steps. 67% of this year's budget (over \$7.2 million) pays for teacher and staff salaries and benefits. Because the Annual Fund helps Urban offer competitive faculty salaries and benefits, Urban students are guided and taught by an extraordinary group of faculty. Likewise, Annual Fund contributions ensure that the school can attract as many talented teachers as are necessary to maintain a low student-to-teacher ratio.

### **How much is spent on financial aid each year?**

This year, Urban awarded \$2.1 million in financial aid to 27% of the student body, an increase from \$2 million to 26% of students in 2009-10. In addition, Urban has grown its commitment to financial aid by over \$1 million in the past five years. Our program is strong and quite generous when compared to many schools. About one in four families receives aid, with an average gift size of about \$22,000 per family. In a sense, every student at Urban receives financial assistance because tuition covers only a portion of the true cost of an Urban education. This "gap" is \$2,879 per student in 2010-11.

### **Why should I give to the Annual Fund when I already pay tuition?**

While tuition pays for 89% of an Urban education, the Annual Fund provides 10% of the operating budget to bridge the difference (or gap) between tuition revenue and the actual cost of the program. This year the difference/gap is \$2,879 per student.

Unlike public schools, independent schools operate without any financial support from the local tax base or from state or national governments. Urban relies on tuition income, interest income and annual contributions to cover its operating costs. Every independent school is structured in this way, so that parents can receive a charitable tax-deduction for their donations, and so that tuition is less expensive to allow greater accessibility and benefit families with lower incomes.

It is also important to remember that students today benefit from the generosity of previous families who made significant investments in the campus and school resources.

## **Why is full participation necessary and important to the Annual Fund?**

Full parent participation in the Annual Fund demonstrates solidarity within the Urban community. It also indicates to corporations, foundations, major donors and friends that those who are most connected to Urban are committed to its future well-being. Therefore all gifts, regardless of size, are tremendously important. Each year we strive to increase participation levels among the parent body. Parent participation in the 07-08 and 08-09 Annual Fund was 95% and last year participation reached 96% - the highest among Bay Area independent high schools. Our goal this year, as always, is 100% from current families.

## **Do parents who donate their time to Urban support the Annual Fund?**

Urban is indebted to the many volunteers who contribute their time, energy, advice and talent. Many of the programs unique to Urban would not be possible without the dedication of our parents. However, every non-profit educational institution also needs Annual Fund dollars to balance their budget. It is our hope that every family participates in this critical effort.

## **What are the gift clubs this year?**

### Leadership Giving

- Presidio Pacesetters - \$15,000 or more
- Foghorn Philanthropists - \$10,000 or more
- Golden Gate Givers - \$5,000 or more

### Filling the Gap

- Barbary Coast Boosters - \$2,879 or more (bridges the tuition gap)

### Participation Giving

- Panhandle Patrons - \$1,000 or more
- Page Street Blues - \$500 or more
- Haight Ashbury Helpers - \$100 or more
- Cable Car Contributors - \$1 or more

Donors who give gap gifts and above will be thanked with a special reception hosted by the Head of School and Board of Trustees on Thursday, May 12, 2011.

All gifts and contributions, regardless of their size, are recognized and appreciated. Every donor will receive a personal thank-you letter from the Head of School. Urban's Annual Report always lists every donor's name.

## **Is Urban raising money for its endowment or future capital needs?**

Urban's Board of Trustees convened a Major Gifts Task Force in 2008-09 to raise funds for its endowment and building fund. To date, more than \$2 million has been committed.

### Endowment Overview:

Urban's endowment is a pool of invested funds that produces a permanent flow of interest income beyond tuition revenue to support the school's operating budget. As of June 30, 2010, Urban's true endowment is valued at \$800,000, with additional funds acting as endowment valued at \$3,762,000. In comparison to our peer schools and national standards defined by NAIS (National Association of Independent Schools), our endowment is significantly lower. The school's *Vision 2013* strategic plan calls for significantly building Urban's endowment to guarantee the school's long-term sustainability, to support and retain outstanding teachers, and ensure accessibility for students who require financial assistance.

Contributions to the endowment can be made on an unrestricted basis or designated to address specific areas of support.

### Named Funds:

Named endowment funds enable generous donors to create a lasting and meaningful legacy that reflects their philanthropic priorities. These funds may be created from current gifts, multi-year pledges and planned gifts. Examples of named funds include:

*The Bernice Ach Endowment Fund* was founded in 1993 by members of the Ach family established in honor of Bernice Ach, one of Urban's founders. Each year the fund supports activities and programs that promote intellectual curiosity among students as well as teachers' efforts in this regard.

*The Urban Faculty Professional Growth Fund* was established in 2007 by Gigi Coe and Michael Garland (Malcolm Garland '07) in recognition of Urban's extraordinary teachers. Each year income from the fund underwrites faculty training and professional growth.

*The Merit N. and Carol E. Hancock Scholarship Fund* was established in 2010 by parents Jessica Justino and Bill Hancock (Justine '13) through a donor advised fund. The scholarship fund is in honor of Bill's parents. This endowed fund is restricted to providing financial aid to public middle school students.

*The McCune Family Fund* was established in 2009 by parents Karen Smith-McCune and Mike McCune (Louise ('09) and Emma ('12)) through a Charitable Remainder Trust. The fund will support accessibility for deserving students through financial aid, ensuring that families with limited financial means can attend Urban.

### Senior Class Endowment Funds:

The Senior Class Endowment tradition was started by families in the Class of 2000 as a special thank you to Urban's faculty and administration, and a lasting expression of appreciation for the unparalleled education their children received at Urban. Subsequent classes have carried on this meaningful tradition to grow the school's endowment.

#### *Class of 2009 Endowment Fund*

In 2009, Urban's senior class started a new tradition and launched The Class of 2009 Endowment Fund with long-term pledges (\$10/year for 10 years). An inspiring 69 percent of the class contributed to the campaign in its first year, along with senior parents/guardians and grandparents. Each year, alums and their families are encouraged to grow their class fund.

#### *Class of 2010 Endowment Fund*

Last year, the Class of 2010 raised over \$140,000 from senior students, parents, grandparents and friends. An inspiring 73% of students in the senior class participated in the campaign and pledged to contribute \$10 a year for five years to their Class of 2010 Endowment Fund.

#### *Class of 2011 Endowment Fund*

Our goal is to continue the momentum from the past two years and raise \$100,000+ from the Class of 2011 community. Stay tuned for further details!

### Future Capital Needs:

The Board of Trustees is actively pursuing opportunities in the neighborhood for a permanent athletics and performing arts facility. We look forward to keeping you apprised of their progress.

In the meantime, we are truly honored that our community has made possible our beautiful physical learning environment and facilities for current and future students. In 2006, our landmark Building Our Future expansion campaign concluded, exceeding its fundraising goal and raising \$9.5 million with gifts ranging from \$10 to more than \$1 million.