



Annual Fund Frequently Asked Questions

Q. What is the Annual Fund?

A. The Annual Fund, St. Margaret's annual giving program, supports nearly every aspect of a St. Margaret's education. Participation in this program at any level demonstrates our community's belief in our school's commitment to preparing students and fulfilling its mission. In fact, the strength of St. Margaret's and its programs is a direct result of the collective effort of alumni, parents, faculty, staff and friends who participate every year in the Annual Fund. The Annual Fund provides immediate, flexible resources to help fund the school's highest priorities –technology, sports, visual and performing arts, financial aid, faculty support, campus renewal, etc.

Q. How does the Annual Fund benefit my child?

A. Every child at St. Margaret's Episcopal School benefits directly from the gifts made to the annual fund. Whether the funds are spent on enrichment, extracurricular activities, advanced learning opportunities, or information technology, the Annual Fund allows us to provide the finest education for each and every student at St. Margaret's – from Preschool through Grade 12. Remember that you are making a charitable contribution and that your gift is tax deductible as allowed by law. This is one of the few opportunities you have to make a gift that directly impacts and benefits your child.

Q. Can Annual Fund gifts be restricted?

A. Unrestricted gifts to the Annual Fund are strongly encouraged, as they allow us to direct resources to the areas of greatest need or in response to a special opportunity. Gifts to the Annual Fund may be restricted only if they cover an existing operating expense in a board approved budget. St. Margaret's has designated ten areas of donor opportunities as follows:

- General School Opportunities
- Pre-School Classroom costs
- Lower School Classroom costs
- Middle School Classroom costs
- Upper School Classroom costs
- Educational support services
- School Administration
- Facility costs
- Financial Aid
- Arts and Athletics

Q. What is the best way to make a gift to the Annual Fund?

A. There are many options for making your gift:

- You may make a secure credit card donation online at www.smes.org/giving.
- Checks made out to St Margaret's Episcopal School can be mailed to the advancement office, *Attention "Annual Fund,"* at 31461 La Novia, San Juan Capistrano, CA 92675.

- You can make a gift of stock (please contact the advancement office or visit www.smes.org/giving for information on the transfer of stock).
- Many companies also provide matching gift programs for employees who make charitable gifts. When you make a gift to the Annual Fund, check to see if there is a matching gift program where you work that can additionally benefit the school.

Q. Is my gift tax-deductible?

A. Yes! Unlike your tuition payment, your gift to the Annual Fund is tax deductible to the extent allowed by law. You will receive a letter thanking and acknowledging your gift, which can be used as a receipt for tax purposes.

Q. I volunteer a lot of time at St. Margaret's. Doesn't that matter as much as giving money?

A. St. Margaret's relies heavily on its parent volunteers to help with virtually every aspect of our school. From board members and classroom volunteers to PTF members and hot lunch volunteers, you play a critical role in the life of our school. Your financial support is another important venue to make a significant impact on the life of the school and the future of the children at St. Margaret's.

Q. Why is it important to have a high percentage of families participating in the Annual Fund?

A. Participation is the most important part of the Annual Fund. **Every participating family makes a difference.** When foundations and corporations consider schools for grants, one of their first questions is the percentage of families that contribute to the Annual Fund. Your Annual Fund support is a quantifiable measure of the "health" of the school, and organizations use this measurement, among others, to decide whether St. Margaret's is a good investment. With more than 8,000 Preschool through Grade 12 independent day schools in the United States, your participation helps to make St. Margaret's an outstanding choice for grants from foundations and corporations.

Q. I already pay a lot for tuition. Why do I need to also give to the Annual Fund?

A. The Annual Fund helps keep tuition fees from increasing too drastically or at all. Without support to the Annual Fund, tuition may have to be greatly increased and/or certain programs and extracurricular student activities may need to be cut. The Annual Fund is an additional investment in the education of each child at St. Margaret's and an important source of revenue to guarantee the financial health of the school.

Q. How much should I give?

A. If we were to answer in dollars, the answer is different for each family. Reflect for a moment on the importance to each student of her or his experiences at St. Margaret's. Our school as it is today –the high educational standards, the strength of our arts, athletics and clubs, the state-of-the-art science equipment and classroom smart boards – has been made possible by more than two decades of charitable gifts received from the current and past generosity of current and former parents, parents of alumni, grandparents, trustees, and friends.

So when it comes to deciding how much to give, we ask that you consider the importance you place on the tangibles listed above, the education your child receives thanks to AF support, and your family's circumstances. We ask that you consider giving generously based on all of these. Please remember: every gift makes a difference.

