

THE POST OAK SCHOOL



*Reaching the*  
**GOAL!**

2020 POST OAK FUND DRIVE

Thank you for taking the time to read  
this information and making Post Oak  
a part of your charitable giving.

# Making a Difference Together

Thank you for considering a donation to this year's Post Oak Fund. As a member of this non-profit organization, you have joined a long history of extraordinary volunteer activity and dedication. The partnership between our school and our families has ensured long-term growth and development. Your donation to the Post Oak Annual Fund contributes directly to the success of our school.

We pride ourselves on continuous improvement and helping parents understand the importance of the Post Oak Fund. Before making your donation, **please take time to read through this brochure** and let us know if there is any additional information you need to help make a more educated donation.

Finally, it is so important to recognize that you are not alone in your donation. The campaign started in early August and you should know that **100% of our trustees and employees have already donated.**

## THIS YEAR'S FINANCIAL GOAL IS \$350,000

October is annual fund month. We ask for responses to be returned by October 31, and all pledges are due by May 31, 2020.

Please contact your class captain with any questions you may have about the campaign.

Donors of \$3,000 or more are recognized as *Leadership Circle* members of The Post Oak School and will be invited to our annual spring reception.

The average annual fund gift by Post Oak families is \$1,000 - Friends of the Bearkats level. Please consider giving at the Community Level of \$500 or above.

For additional response forms or to donate online, go to [www.postoakschool.org](http://www.postoakschool.org) or contact the Development Office at (281-822-8024) or [christinacantu@postoakschool.org](mailto:christinacantu@postoakschool.org).

# EDUCATE BEFORE YOU DONATE

Understanding The Post Oak School's finances is the first step to understanding our need for financial support through the Annual Fund.

## COLLECTION OF INCOME

The main sources of income are tuition, fees, and donations. Donations ("soft income") are comprised of the Annual Fund, the Biennial Gala, and other fundraising activities. Last year, tuition and fees plus other "hard income" covered 100% of the school's core operating expenses.

## FINANCIAL APPROACH

The school operates as a whole in compliance with generally accepted non-profit accounting principles, which are audited annually by the firm of Blazek & Vetterling. In addition, the school submits a 990 non-profit informational tax return which is available from the Business Office and is a matter of public record.

For internal accounting purposes the school uses a cash based model developed by Independent School Management (ISM).

The school's income and expenses are separated into hard income, which includes tuition, fees, and investment income. The school balances these items against what we consider hard expenses, which are the items that support the programs of the school. These expenses include salaries and benefits, other program expenses, support of property, plant, and equipment, as well as administrative expenses to run the school.

The other part of the school's operating budget consists of what we consider soft income, which is Annual Fund dollars, Gala income, and other fundraising. The other soft components for the school are the discretionary expenses that the school incurs each year. Soft expenses also include transfers to the board-designated endowment fund.

## HOW HAVE WE DONE IN THE PAST?

In most years we exceed our goal and achieve above 95% participation from the parent community, and 100% from employees and board members.

POST OAK FUND SHORT HISTORY				
YEAR	GOAL	CONTRIBUTIONS	ENROLLMENT	PARTICIPATION
2019	\$340,000	\$375,523	514	97%
2018	\$330,000	\$364,000*	524	93%
2017	\$300,000	\$337,000	492	98%
2016	\$300,000	\$337,000	467	94%
2015	\$300,000	\$283,067	451	84%**
2014	\$250,000	\$319,716	445	96%
2013	\$250,000	\$287,853	416	96%
2012	\$250,000	\$265,408	378	98%
2011	\$250,000	\$250,028	376	98%
2010	\$250,000	\$266,217	365	99%

\* In addition, \$174,000 was raised in support of Hurricane Harvey repairs.

\*\*This was the public-phase year of the Big Work Capital Campaign.

# ANSWERS TO COMMONLY ASKED QUESTIONS

## *What is the Annual Fund?*

The Post Oak Fund is the name of our Annual Fund. Every year we look to our trustees, parents, alumni, past parents, grandparents, foundations, and corporations for this essential tax-deductible support. The collected funds are then spent on a discretionary basis to improve and stabilize our school's environment. It also allows us to respond quickly to the needs of the school not covered in our annual operating expenses. For example: increased professional development, unexpected facility repairs, and enhanced technology.

## *What is the difference between a capital campaign and the Post Oak (Annual) Fund?*

Simply stated, annual fund gifts support stability, while capital campaign gifts support growth.

Post Oak's last major campaign, The Big Work Capital Campaign (2015) was focused on expanding and renovating our Bissonnet and Museum District Campuses. Unlike many private schools that engage in on-going capital campaigns, Post Oak's only other capital campaign happened in 2000.

The Post Oak Fund is an annual request to support the school's financial strength, stability, and flexibility: providing a rainy day umbrella to protect against unexpected expenses or episodic revenue shortfalls; and to cover a variety of discretionary expenses such as additional financial aid, upgraded technology, professional development, and small renovation projects. It also allows the school to take advantage of strategic opportunities when they arise.

## *What does the school expect of us?*

The school expects parents, as members of a non-profit organization, to pay tuition on time and to get involved. That involvement includes participation in the Annual Fund, to the

extent that they are financially able. It also includes volunteering or taking part in special events sponsored by the school and supporting periodic capital campaigns.

*Why does the school ask us for contributions in addition to what we already pay for tuition?*

Annual Funds are common practice among independent schools. From pre-schools to colleges, independent schools all use annual fund donations to help compensate for expenses not covered by tuition. In fact, over 90% of these schools operate on a tuition gap basis where the tuition is 10 to 25% less than total expenses. They depend entirely upon their annual funds to cover the gap for budgeted expenses. The Post Oak School is different. Guided by Independent School Management (ISM) for over twenty years, our administration takes a very conservative approach to ensure that our critical operating expenses (salaries, utilities, benefits, maintenance, etc.) are all covered by tuition. The Annual Fund is used for continuous improvement in facilities, professional development, technology enhancements, and increased financial aid. It also ensures our long term stability by building up our cash reserves needed to cover unexpected expenses and small renovations. All these contributions are needed to provide our children with the best environment possible.

*Why doesn't the school simply charge more tuition?*

If tuition were increased many families could not afford to send their children to our school. This could mean a drop in enrollment resulting in steeper tuition increases and discretionary spending cuts which would ultimately affect your child's education. Additionally, charitable contributions would be even more difficult to obtain.

*Why do we ask for 100% participation from parents, members of the board, teachers, and all other employees?*

Post Oak also receives donations from foundations and corporations. These institutions will only consider support after they've seen that the people who are directly receiving the benefit from the institution have shown their commitment. 100% participation shows unquestionable support.

*Is it important to support all school fund raisers?*

Yes! Unlike so many other schools that have a multitude of fund raisers nagging you throughout the year, we have streamlined our school-wide fund raising to three efforts: Annual Fund, Annual Book Fair, and Biennial Gala.

*The goal is big—do small gifts really make a difference?*

Yes, they do. All gifts are important and appreciated. If you are considering a small one time donation, please consider setting up an automatic monthly charge to your credit card as an alternative. If every family who gave \$100 in the past would consider donating \$25 on a monthly basis to the Post Oak Fund it would have a significant and positive impact on the campaign.

*How much should I give?*

Post Oak plays a significant role in the lives of our families. We encourage you to give an amount that is meaningful for your family. The average gift is \$1,000. We receive family gifts from \$100 to \$25,000. Please consider making a Community Level gift of \$500 or above.

*Can I choose where the school spends my donation?*

Yes. The Post Oak Fund allows you to direct your gift in the following categories:

- ◆ Financial Aid
- ◆ Financial Sustainability (e.g. endowment)
- ◆ Capital Expenditures (e.g. building repairs)
- ◆ Professional Development (e.g. sabbatical awards, teacher training, professional conferences)
- ◆ Wherever the school needs it most

The school reserves the right to redirect gifts as needed if a fund has become oversubscribed.



*How much do I need to give to be recognized in the annual report and to become a member of the Leadership Circle?*

All contributors appear in the annual report. Donations to the Annual Fund of \$3,000 or greater are recognized at the Leadership Circle level. Those members are invited to an annual spring reception. Gifts of \$1,000 to \$2,999 are recognized as Friends of the Barkats, and gifts from \$500 to \$999 are recognized in the Community Level.

*Is my gift tax deductible?*

Yes. Post Oak is a non-profit organization. Any gifts made to the school are tax-deductible to the extent allowed by law.

*My company offers a matching gifts program; would the school be interested in this program?*

Absolutely. Matching gifts are an easy way to double, or in some cases triple, the amount of your gift. Please submit the matching gift form from your company to the Development Office.

*What exactly is the “Endowment?”*

About 18 years ago, several trustees worked to create the endowment and provided the seed money. Since that time, through additional gifts and foundation grants, our endowment has grown close to \$3 million. Unlike Post Oak Fund gifts which are spent on annual expenses, endowment gifts are restricted and the corpus remains untouched. The board determines when endowment interest can be spent, in accordance with the Endowment Policy. As the endowment grows, more endowment money will be available to cover school costs and that means lower tuition increases.

- MAIL Fill in the reply form mailed to your family and return it either in person or by mail to Post Oak.
- ONLINE Log on to the school's website and click on the giving button on the homepage to make your pledge or donation with a credit card. We accept MasterCard, VISA, AmEx, and Discover.
- EMAIL Pledges are due at the end of the school year, but your participation counts now. Fill out the online form OR email your pledge (name and amount) to *christinacantu@postoakschool.org*.
- MONTHLY Donate monthly through your bank's Online Bill Pay. Set The Post Oak School as a new "payee," designate "Annual Fund" in the memo section and set to automatically recur.  
-OR-  
Charge your monthly donation by selecting the option online or on the reply form. Your credit card will be charged over the number of months you select.
- MATCH Many employers match part or all of employee charitable gifts. Indicate at the time of your donation that a request has been made. You will be recognized as a member of the *Leadership Circle* if your combined gift is \$3,000 or greater.
- STOCK We welcome gifts of securities or stocks. If you are considering making a non-cash donation, please contact Development Director Christina Cantu (*christinacantu@postoakschool.org*) to receive transfer information.

# The 2020 Post Oak Fund Cabinet

## FUND CHAIRS

Tricia and Mark Singer

### Class Captains

BAGBY, LONDON .....	Havian & David Immler
BLESSMAN, CYNTHIA.....	Jessica & Josh Solera
DE LEON, SANDRA .....	Pamela Griffin
DURAN, REBECCA.....	Adrienne & Snehal Amin
HANSEN, EMILY .....	Lorena Rojas & Oscar Parada
KLUK, ORLY .....	Margaret & TJ Farnsworth
OLITZKI, BETH.....	Lisa Heyden
PINTO, ERROL.....	Grace Lewis
PINTO, MAYA.....	Reena Jogi
REBUFFINI, KERI .....	Alison Altenberg
SMITH, KARYN.....	Jessica Matos
SMITH, RENEE .....	Ariella Perlman & Robert Johnson
SOOD, SIMRAN .....	Ginny Ashton
TAJ MAHMOOD, ANITA.....	Sandhya & Naresh Sabhnani
TOWNSEND, TAMARA .....	Emily & Robert Emmett
VILLALOBOS, ELIZABETH .....	Kate Sedano
MIDDLE SCHOOL .....	Vareen Cunningham
9TH GRADE .....	Orly Kluk
10TH GRADE .....	Abbe Forman
11TH GRADE .....	Elizabeth & George Farish
12TH GRADE .....	Anita Ying
BOARD.....	Maura Joyce

Your Class Captain is found under the class of your oldest child.

# ANNUAL FUND AT WORK

Annual Fund gifts have recently helped the school in a variety of ways including:

1. An increase in financial aid of 11% to over \$1.3 million;
2. Increased faculty professional development;
3. A new Young Children's Community playground;
4. The purchase of a new vehicle to transport students to internships;
5. Exterior painting of the gym;
6. Carpentry at the Bissonnet Campus;
7. Repair of the broken concrete pad at the Bissonnet Campus;
8. New parking spaces added to the Museum District Campus;
9. Foundation floor repair in the Middle School building;
10. Endowment support.
11. The purchase of a new activity bus to replace the flooded bus;
12. Installation of a new chiller at the Bissonnet Campus;
13. 6000 sq. ft. of new flooring in the Primary and YCC area;
14. Foundation floor repair in the Middle School building;
15. Upgrade 25% of outdoor lighting to LED;
16. Replacement of our Bissonnet Campus roof—a \$250,000 project;
17. The continued 5% transfer of yearly fundraising to the endowment;
18. Increased professional development for teacher training;
19. Additional furnishings in the High School.

*The*  
POST OAK  
SCHOOL



Bissonnet Campus: 4600 Bissonnet Street ■ Bellaire, Texas 77401  
Tel. 713-661-6688 ■ Fax 713-661-4959

Museum District Campus: 1010 Autrey Street, Houston, Texas 77006  
Tel. 832-538-1988 ■ Fax 832-538-1926

[www.postoakschool.org](http://www.postoakschool.org)