



Our Culture of Generosity

A guide to understanding our community's gifts of time, talents, and treasure





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2022-23 School Leadership

Head of School – Steve Hancock
Assistant Head of School for Teaching and Learning – Amy Hand
Head of Preschool and Lower School – Michael Tauscher
Assistant Head of Preschool and Lower School - Gina Bongiorno
Head of Middle School – Elaine Griffin
Assistant Head of Middle School - Brad Dunning
Interim Head of Upper School – Dr. Gina Haughton
Assistant Head of Upper School - Sue Bolly
Director of College Guidance - Susan Zarwell '87
Director of Athletics - Tim Williams
Chief Financial Officer - Kelly McGuire
Chief Advancement Officer - Patrick Tevlin
Director of Strategic Operations - Stuart Cushman
Director of Enrollment Management - Eric Peters
Director of Marketing and Communications - Tim Eilbes
Director of Auxiliary Programs - Joe Ali
Director of Human Resources - Isabel Ornelas Davila

2022-23 Volunteer Leadership

Board of Trustees President – Karin Werner
Endowment Board President – Thomas W. Florsheim Jr. '76
Parents' Association President – Cathie Torinus
Alumni Association President – Colleston Morgan '03
Booster Club President – Jen Darrow





University School of Milwaukee Fundraising at a Glance

Giving Type	Frequency	What it Supports	Real-life Equivalent
USM Fund	Every year	Supplements tuition revenue to cover annual operating budgets and supports programs, facilities, maintenance, and tuition assistance	A checking account
Endowment	Donor-directed	Supplements tuition to cover expenses in annual operating budgets, such as faculty and staff development, and other areas of school life, including tuition assistance	A savings account that earns interest
Planned giving	Once in a lifetime	Helps ensure the school's financial future by funding donor's choice of programs, facilities, and other support	A retirement plan
Capital campaigns*	Periodically	Funds facility enhancements and building renovations, which are not covered by tuition revenue	Putting an addition on a home you already own
Auxiliary giving, Parents' Association, Booster Club	Donor- and volunteer-directed	Funds special unbudgeted needs and program expenses that are beyond annual operating expenses	Receiving a gift from a family friend

* Capital campaigns can be comprehensive in nature. See definition on page 8.

University School of Milwaukee is a 501(c)(3) nonprofit organization and accepts tax-deductible gifts and special financial support from members of its community.

Our Culture of Generosity

University School of Milwaukee exists because of the support of our entire community, from parents of current students to an extensive network of alumni, grandparents, trustees, parents of alumni, faculty, staff, and other friends and volunteers.

The commitment of our community allows our school to carry out our mission of offering an exceptional PK-12 independent school education that ignites a passion for learning, leadership, and service in our students. That mission is what drives our portrait of a graduate, which charges the school with developing learners, fostering leaders, and preparing citizens for success in college and in life.

Our students have benefited from such volunteerism and philanthropy since the days of our predecessor schools: Milwaukee Country Day School, Milwaukee Downer Seminary, and Milwaukee University School. Generations of families in the greater Milwaukee community have made an investment of time, talents, and treasure in the future of our school to ensure the very best education for our students.

Time and Talents

Whatever your talent or passion, and whatever your time available to volunteer, USM appreciates and depends on your help. Here are just some examples of the many ways in which members of our community get involved:

- Mentoring Tower Project capstone students in 4th, 8th, and 12th grades
- Collecting gate tickets at athletic events for the Booster Club
- Working with the Upper School's internship and job shadowing program
- Serving as room parents or grade level coordinators
- Volunteering with the Parents' Association's annual Holiday Shops event
- Contacting new families and welcoming them to the school community
- Assisting faculty and students with special projects
- Serving on a working committee

Treasure

Like all independent schools, tuition and fees do not cover the total cost of educating our students, so additional financial support from all members of our community is critical to our students' success. This support also helps keep tuition increases to a minimum, and demonstrates a belief in our school and its mission. USM is a 501(c)(3) nonprofit organization, and accepts tax-deductible gifts and special financial support from our community in the ways outlined in this booklet.

Corporations, foundations, and others often look to the school's high participation rate amongst its many constituencies when considering making a gift to USM. This is an indication of the school's success in achieving its mission. Regardless of the size of your contribution, every gift makes a difference.

USM Fund

The USM Fund is our school's annual giving program, and is our number one giving priority. Dollars raised through the USM Fund are a vital part of our annual operating budget, and these tax-deductible gifts support virtually every area of school life. All parents and grandparents of our current students, along with alumni, parents of alumni, faculty, staff, and trustees, are strongly encouraged to contribute to the USM Fund each year. Support of the USM Fund demonstrates the loyalty, commitment, and generous spirit of our entire USM community.

Contributions and pledges for each new fiscal year are accepted beginning July 1 of that year, with all pledge payments due by the following June 30. USM Fund donors may direct their gifts to the school's greatest need, or to one of the following areas:

- Athletics
- Faculty and staff
- Tuition assistance
- Fine arts
- Outdoor education
- Innovation
- JEDI (Justice, Equity, Diversity, Inclusion)

To learn more, visit www.usm.org/annualgiving.



USM Fund FAQ

Why are parents and families asked to contribute beyond paying tuition?

Tuition and fees cover approximately 78% of the annual cost of each student's education. Typically, the difference between tuition and the full cost of instruction for all of our students adds up to more than \$5 million that must be covered by other sources. Like other independent schools, USM relies on this essential annual support, as well as income from the school's endowment and other auxiliary revenue, to deliver an exceptional education to all of our students.

Why doesn't USM just increase tuition to cover the full cost of educating each student?

USM provides an exceptional value to families who see the value of a top independent school education for their children. If tuition was increased to cover the entire cost of instruction and all related expenses, many mission-appropriate families would not be able to afford a USM education for their children. Unlike an increase in tuition, which is not tax-deductible, gifts to the USM Fund allow you to determine your level of support for our school community.

Does USM accept matching gifts?

Many employers will match charitable contributions made by their employees, and USM is able to accept these matching gifts. If your company has a matching gift program, please request a matching gift form from them. Your gift to the USM Fund could be doubled! We also recognize these corporations and organizations and their matching gifts in our annual report of giving.



Endowment

Gifts to help grow the school's endowment are particularly valuable because they are invested for the long term, creating a permanent source of funding for ongoing priorities, such as scholarships and financial aid, faculty and staff salaries and support, programmatic enhancements, facilities maintenance, and all aspects of school operation, on an annual basis. Only a portion of the income earned annually from our endowment draw is used to support these priorities; the principle is reinvested so the endowment will continue to grow over time. A strong endowment helps a school such as ours sustain its vision and provides a perpetual financial fabric, including flexibility during tough economic times.

The University School of Milwaukee endowment fund is a collection of funds (unrestricted and restricted) that has existed since the merger of our predecessor schools in 1964. Our endowment is what allows us to carry out our mission today and is vital to the future success and growth of the school. The endowment provides about 12% (currently approximately \$3.9 million) of the school's annual operating budgets, making it one of the school's three main sources of income, along with tuition revenue and gifts to the USM Fund. The generosity of the members of our USM community—who have supported the endowment for more than 65 years—allows us to offset rising tuition costs, attract high-quality teachers and administrators, and provide scholarships and financial assistance to mission-appropriate students.

To learn more, visit www.usm.org/endowment.



Endowment FAQ

What options do I have for contributing to USM's endowment?

All members of the USM community are welcome to support the endowment with a one-time gift or a multi-year commitment. Alternatively, a group of people can collectively contribute to an endowed fund over time. Often donors support the endowment through their estate, also known as a planned gift, providing benefits to their estate, their family, and to USM. Gifts to the general endowment support USM in perpetuity. Establishing a new, named endowed fund in which the donor(s) designates the fund to a school priority involves a minimum commitment of \$50,000.

Can a named endowed fund be created in someone's honor or memory?

Occasionally, USM's Board of Trustees may elect to name an endowed fund after a particular individual as a means of recognizing outstanding service or contributions to USM, if those funds are already in place. Donors or groups of donors may also elect to name a newly established endowed fund for a celebrated individual, whether that is a member of a family or a faculty or staff member. Again, named endowed funds that support the priorities of the school may be funded with a minimum commitment of \$50,000.

How is the USM endowment managed and invested?

USM's endowment fund value exceeded \$100 million as of June 30, 2022. The fund is managed by an endowment board, and is invested with Commonfund, a nonprofit investment management firm that serves more than 2,000 independent schools, universities, and nonprofit organizations. The endowment board membership consists of former USM trustees, who follow a long-term investment strategy, calling for a 75-25 equity to fixed income ratio with meaningful international exposure and a careful commitment to alternative investments, such as private equity.

2022-23 Endowment Board

President: Thomas W. Florsheim Jr. '76

Secretary/Treasurer: C. Frederick Geilfuss II '71

Trustees: David J. Lubar, Linda Mellowes, Alice E. Read '72, Ann Reinke, Frederick P. Stratton Jr. MCDS'57, William A. Wernecke Jr., Sarah Zimmerman '92

Ex Officio: Steve Hancock (Head of School), Karin Werner (Board of Trustees President)



Planned Giving

USM plays a significant role in the lives of the various members of our community, and planned giving allows you to plan for the long-term sustainability of the school, often without reducing your income or diminishing your savings. Planned giving is a way for donors to leave a legacy at USM and have an impact beyond their lifetimes while also caring for their needs and those of their loved ones. This support is accomplished by including the school in your will or living trust; adding the school as a beneficiary of a retirement fund or life insurance policy; or adding the school as the beneficiary of another type of planned gift, including many creative giving opportunities.

Arranging for a planned gift to USM may allow you to make a larger charitable gift than you thought possible, and members of the school's Advancement office are glad to discuss this option with you and your financial advisors. Many different types of assets—such as bank investments, retirement accounts, insurance, stock, and mutual fund accounts—can be transferred to the school without any legal expenses and may even result in tax savings for the donor. A planned gift can provide income for you and/or other family members, reduce income and estate taxes, and enable you to put in place an enduring legacy within the school community.

Heritage Society

The Heritage Society, formed in 1991, consists of a group of donors who have informed us that they have planned future support of USM among their charitable interests. Members of the Heritage Society receive special recognition in our annual report of giving and have the satisfaction of knowing their gifts will help perpetuate the tradition of academic excellence at USM and its predecessor schools.

To learn more, visit www.usm.org/plannedgiving.



Planned Giving FAQ

What planned giving strategies are available to help meet my charitable goals?

There are many ways to make a planned gift to USM, including more straightforward options as well as more creative ones. You could include a gift in your will or living trust; use appreciated stock instead of cash to make a gift; name the school as a beneficiary of your retirement plan and leave less-taxed assets to family members; create a life-income plan, such as a charitable gift annuity or charitable remainder annuity trust; and many other options. We would be more than happy to discuss options to help meet your goals with you and your financial advisors.

Does USM offer any planning tools to help me consider my various planned giving options?

Yes; in addition to the support of an Advancement office representative to aid in your planning, we offer pertinent and useful information in the planned giving section of our website (www.usm.org/plannedgiving), such as a glossary of terms, information for professional advisors, information about many different types of planned giving options, stories from fellow donors on their planned gift, and more. And of course, we are always more than happy to discuss this information in person with you as well to help you understand your options.

Can my planned gift be kept private and confidential?

We understand that this type of gift is often a very personal and sensitive decision for an individual. Any planned gift, and any discussions around planned giving, will be kept confidential. In addition, donors have the option for their planned gifts to remain anonymous even after they have been received by the school.



Campaigns

Similar to most independent schools, USM's Board of Trustees periodically plans and approves special fundraising initiatives, such as a capital campaign to enhance or add to our facilities, and at times, to grow the endowment. The trustees work to ensure that campaign efforts support the school's mission and guiding principles, as well as its strategic plan. In addition to the annual USM Fund program, and various endowment campaigns, the school has held various capital campaigns over the years, focused on additions and enhancements to the Lower School, Middle School, and Upper School; stadium, ice rink, and tennis center improvements; and the installation of turf fields, among other projects.

On occasion, independent school boards will plan for a comprehensive campaign. This type of campaign incorporates multiple types of fundraising efforts—potentially including annual giving, capital project funding, and endowment support—into one coordinated, overarching effort, often under the umbrella of a common theme, and usually within a fairly well-defined time period of several years. Comprehensive campaigns can also be popular with prospective donors, as a school and its board are able to coordinate inclusive, “one-ask” approaches with members of their communities, and campaign investors are able to tailor their giving around various personal areas of interest in one combined pledge, often paid over a period of five years.

USM's most recent campaign, Our Common Bond, was successfully completed on June 30, 2020. Together, we raised more than \$30 million to transform the future of education at University School of Milwaukee. The numerous outcomes of Our Common Bond have a direct and positive impact on our students' daily lives. USM shares its gratitude as we continue to celebrate this significant accomplishment.

To learn more about the projects funded by the Our Common Bond campaign, visit www.USMOurCommonBond.org.





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OF MILWAUKEE

Auxiliary Groups and Leadership

Like all independent schools, USM is governed by a board of trustees, which focuses on long-term strategic planning and the overall financial well-being of the school. A separate endowment board oversees the school's endowment fund.

USM also has several auxiliary groups within the community that are overseen by members of the school's administration. These groups—which include the Parents' Association, Alumni Association, and Booster Club—each have leadership boards or councils which are intended to provide guidance and direction for the areas that they oversee. As is the case with nearly all nonprofit organizations, the leadership of these groups serve in unpaid, volunteer roles.

Members of these groups' leadership boards or councils are also charged with the upholding of high ethical standards and a commitment to avoid any conflicts of interest. These groups are expected to be careful stewards of the school's resources. Service on these boards and councils comes with the expectation of a commitment to the school's mission and guiding principles as the groups work to support the specific areas that they oversee.

The individuals who serve on each of these groups' boards and councils are also expected to contribute to the school by volunteering their time, investing in the school's future through their philanthropy, or both. USM is grateful for the role these groups and their members serve in support of the school.



Board of Trustees

The USM Board of Trustees is comprised of alumni, parents, and other community members whose vision and knowledge have a great impact on the school, both today and in the future. This board is comprised of 20 to 25 regular members who may each serve up to three three-year terms, along with up to three community trustees, who may each serve up to three one-year terms. The board's immediate past president, along with the head of school, Parents' Association president, and Alumni Association board president, also serve as ex officio members.

Potential new trustees are identified and vetted by the board's committee on trustees. This committee strives for a diversity of expertise and representation of the school community, identifying specific professional and personal characteristics based on the strategic needs of the school. Trustees serve on multiple board committees, joined by members of the school administration and general school community.

The executive committee of the board consists of the president, executive vice president (if applicable), vice president, secretary, treasurer, and others as elected. The board does not directly oversee or have a hand in the operations of the school; rather, it is the board's role to provide governance and fiduciary oversight for the school and lead long-range strategic planning efforts. Trustees are expected to make USM a philanthropic priority.

2022-23 Board of Trustees

President: Karin Werner

Vice President: Jackie Darr

Treasurer: Gregory Smith

Secretary: Sumeeta Krishnaney '92

Trustees: Mary Bechmann '75, John Bonnell, Charles Brennan '86, Lafayette Crump '91, Kevin Dahlman '92, Kathy-Ann Edwards, Stephen Guy, Jennifer Keough, Sri Lazzaro, Mike Lindemann '96, Tamora Martin, Brigid Miller, Kara Nelson, Michael Pokel, Betsy Rosenblum, Todd Schoon, Leslie Tector '87, Michael Williams '70

Ex Officio: Steve Hancock (Head of School), Cathie Tornius (Parents' Association President), Colleston Morgan '03 (Alumni Association President)

Parents' Association

USM's Parents' Association (PA) serves as a vital link between parents and the school, truly demonstrating our culture of generosity at USM. It aspires to serve and engage families in fostering a strong connection with the school and provide USM with goodwill and support.

Every parent is a member of the PA. Becoming an active participant in this volunteer-driven organization is a rewarding way for parents to experience the school by sharing time, talents, and treasures. Funds raised by the PA are allocated across all academic divisions in support of school activities and other school-wide needs. In the past five years, the PA has donated more than \$500,000 to the school as a result of its fundraising efforts.

The PA organizes many community building events, signature fundraising events, special giving opportunities, and volunteer opportunities. Some of the many opportunities that parents can assist with include the book fair, parent coffee gatherings and socials, guest speakers, parent readers, Willie's Closet (formerly known as the Replenish Rack), Holiday Shops, student dances, 7th Grade Flower Sale, Wildcat Thank You, Washington, D.C. fundraiser, and more.

The PA has a rich history of parent leadership and participation; it is a hallmark of the USM community. The PA executive committee provides the leadership needed to move the PA's goals and objectives forward. In addition to coordinating volunteer efforts, these individuals make every effort to build and sustain positive relationships with all members of the school community.

2022-23 Parents' Association Executive Committee

President: Cathie Torinus

President-elect: Julie Sellars

Treasurer: Rachel Rieck

Secretary: Devree Molnar

Immediate Past President: Jennifer Reese

Preschool Coordinator: Stephanie Handler

Lower School Coordinator: Alli McCartin

Middle School Coordinator: Yulia Jigalina

Upper School Coordinator: Victoria Teerlink

Communications Coordinator: Kim Weissgerber

Volunteer Search Coordinator: Megan Lantz

Volunteer Coordinator: Kathleen Miller

Office Administrator: Patricia Kauffman

To learn more, visit www.usm.org/pa.

Alumni Association

USM's Alumni Association is an international group of more than 5,600 alumni who have graduated from the school (or one of its predecessor schools) and who provide our school with their time, talents, and financial support. Alumni are encouraged to remain involved with their alma mater after graduation to help foster the unique sense of community that is an important part of our school culture. Alumni can serve as regional ambassadors, mentors, reunion coordinators, class agents, and volunteers through the school's alumni office. The Alumni Association is governed by a board made up of alumni.

The Alumni Association board officers are passionate about their alma mater and desire to more deeply invest in shaping, building, and promoting alumni programs, while supporting USM's mission and core institutional priorities. As leaders of the alumni community, board members serve to enrich the lives of our alumni community by inspiring them to live the values of the school and to be catalysts for lifetime engagement.

Parents of Alumni (POAs)

Like our vast network of alumni, our POAs are an important part of our community. We recognize former school parents and the work they've done to enrich the USM experience, and encourage them to stay connected to their children's alma mater which also played an important role in their lives through their involvement with the school. Their belief in our school and the opportunities it has created for their children is a strong testament to the strength of the USM community.

2022-23 Alumni Association Board

President: Colleston Morgan '03

Board Members: Gianna Affi '18, Raj Bhala '80, George Brumder MCDS'55, Catherine Burke '06, Smitha Chintamaneni '96, Maisha Meminger Crosby '95, DJ Denson '14, Ed Eisendrath MUS'61, Chris Russo Hawley '98, Nicole Endres Hobbs '98, Kyle Kaliebe '03, Allison Kelsey '84, Lizzie Keuler '17, Frank Martinez '98, Gretchen Krieg Mathews '06, Sachin Shivaram '99

To learn more, visit www.usm.org/alumni.

Booster Club

USM's Booster Club is comprised of parents, grandparents, faculty, staff, alumni, and other friends of our athletics program. Its purpose is to encourage support for all Wildcats teams and athletes. It strives to foster school spirit and sportsmanship; provide volunteer and financial support; recognize the achievements of our teams and athletes; and support cooperation and communication among all constituents.

The Booster Club's board of directors coordinates the group's volunteer and fundraising efforts. Volunteers work to promote membership and attendance at Middle School and Upper School athletic competitions; organize and promote special events; coordinate and sell merchandise; and manage concession sales at Willie's Corner in Don Forti Stadium and Café Twenty Seventeen in the Quadracci Lobby.

Members of the school's Athletics office serve as advisors to the Booster Club board of directors, which meets monthly. Booster parents for each varsity sport are supported by the Booster Club and liaison with the board to report on specific team activities. Advisory councils consisting of Middle School and Lower School members also work closely with the Booster Club board.

The Booster Club raises funds through membership, the collection of gate admissions, and the sales of concessions and spirit wear.

2022-23 Booster Club Board of Directors

President: Jen Darrow

Vice President: Mindy Grenier '96

Treasurer: Andy Read '90

Secretary: Tami Vincent

Marketing and Membership: Kelly Grebe, Jen Schoon

Boosters Team Parent Liaison: Colleen Polston

Merchandise Coordinators: Shelly Farrow, Mindey Grenier '96, Cathie Torinus

Concessions: Cheryl Sisson

Upper School Special Events Coordinator: Natalie Blais

Middle School Special Events Coordinator: Julie Art '91

Middle School Volunteer Coordinator: Jane Kaltenbach

Middle School Advisory Committee: Amy Langlois, Julie Sellars

Upper School Advisory Committee: Tyra Merriweather, Boyd Miller

To learn more, visit www.usm.org/boosters.

Advancement Office

University School of Milwaukee's Advancement team is here to help you with your support of our school, which is essential to maintaining USM's reputation as one of the top college preparatory schools in the country. Our team is pleased to work with you to develop a gift plan, including planned giving opportunities, that fits your particular needs and interests. You can contact the Advancement office at advancement@usm.org or 414.540.3339, or feel free to reach out to any member of our team directly.



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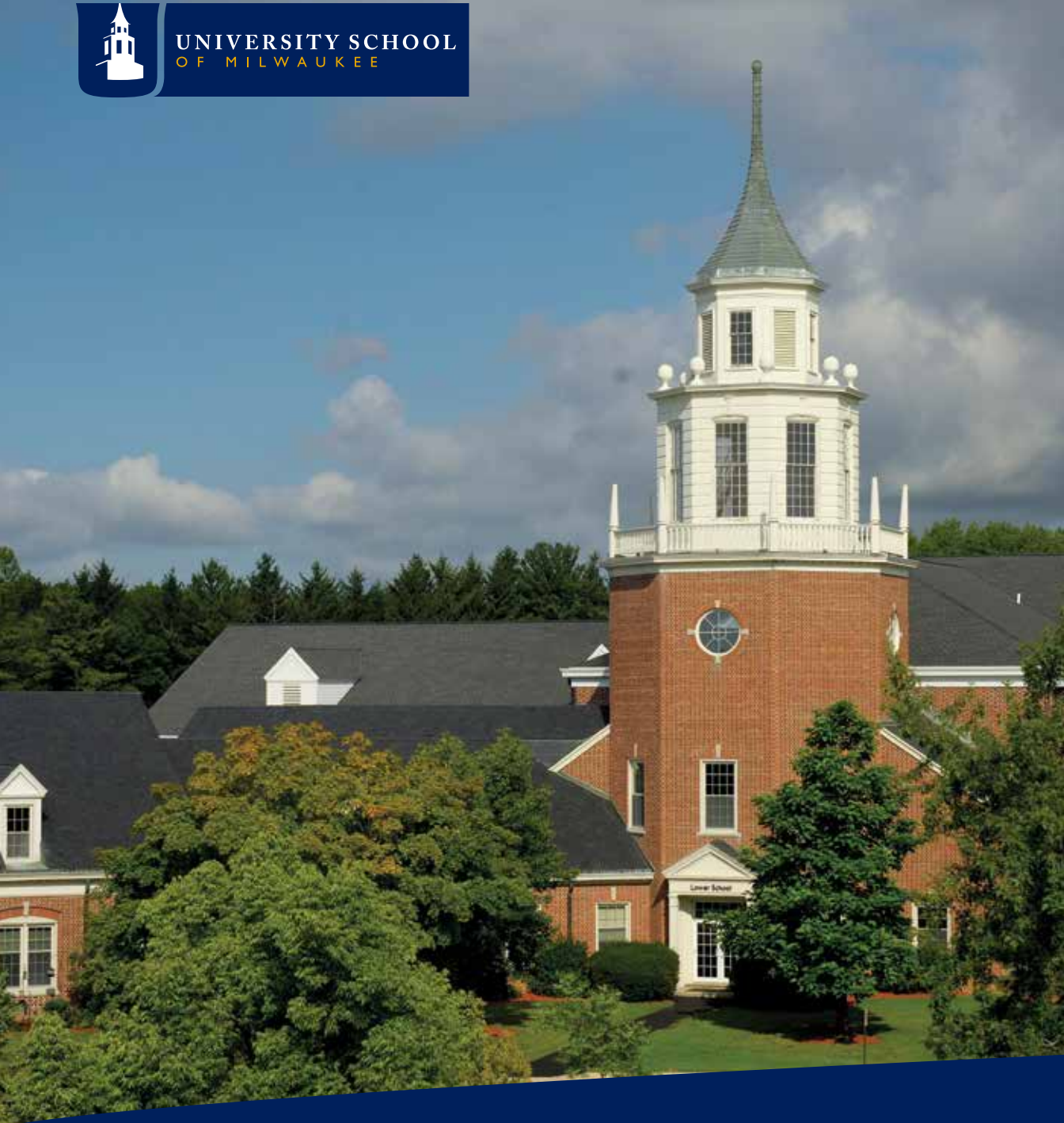
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To learn more about our culture of generosity and available volunteer and giving opportunities, please contact the Advancement office at 414.540.3339 or advancement@usm.org.

USM is a 501(c)(3) nonprofit organization, and accepts tax-deductible gifts and special financial support from our community.