

2022-2023 FREDERICA ACADEMY FUNDRAISING CALENDAR AND DONOR PROGRAMS

To maximize the potential of each student and to prepare every student for college and adult life through the development of mind, body, and spirit.

Frederica Academy, like other independent schools, relies on donor support to bridge the gap between tuition revenue and the actual costs of operating the school. While tuition income currently accounts for approximately 80% of Frederica’s operating budget, donor programs such as the Annual Fund, Apogee, Derby Day, and Restricted Giving primarily cover the balance. Other revenue streams from the Booster Club, Parent Association, Summer Programs, the Knights Table (Cafeteria), and KiX also play a role.

The Annual Fund, Apogee, Derby Day, and Restricted Gifts are indeed the lifeblood of the school's non-tuition income, and each offers donors unique benefits. The Annual Fund offers families a tax-deductible benefit for at least part of their investment in their child’s education. Apogee provides a dollar-for-dollar state tax credit, creating the opportunity for tax dollars to remain in Glynn County as opposed to being disseminated throughout the state. Derby Day offers sponsorships, which allow supporters to advertise a business. The event itself, complete with raffle, silent auction, and live auction, creates opportunities for patrons to make exclusive purchases while supporting FA at the same time. Restricted Gifts, which are typically need and/or donor-driven, help fund new initiatives or expand popular programs of specific importance to the donor.

Frederica Academy also periodically conducts capital campaigns to make significant improvements to the campus. Prior to this year’s Gateway Capital Campaign, it had been over seven years since the last major campaign. More details regarding the Gateway Capital Campaign can be found in its respective brochure, but the impetus for these projects was to both improve and strengthen the student experience and to enlarge campus facilities in order to accommodate a surge in student enrollment over the past three years.



Please Scan for FA’s Board-Approved Gift Policy ►

TOTAL FUNDRAISING COMPARISONS	Year	Amount
	2021 - 2022	\$8,461,546
	2020 - 2021	\$2,156,702
	2019 - 2020	\$1,574,760
	2018 - 2019	\$1,912,338
	2017 - 2018	\$1,537,809
	2016 - 2017	\$1,363,239
	2015 - 2016	\$946,525
	2014 - 2015	\$828,133
	2013 - 2014	\$678,614

2021-2022 FUNDRAISING RESULTS	Program	Amount
	Annual Fund	\$507,174
	Apogee	\$912,200
	Derby Day	\$281,090
	Friends of Frederica	\$10,000
	Restricted Gifts	\$214,929
	Booster Club Memberships + Sponsorships + Restricted Gifts	\$152,633
	2021-2022 Gateway Campaign	\$6,383,520

DONOR PROGRAM	DESCRIPTION
<p>Annual Fund (September - June)</p>	<p>Nearly every independent school relies on annual giving to support its operating budget and bridge the fiscal realities that lie between tuition income and the actual cost of educating students. At Frederica Academy, tuition covers approximately 80% of the expenses of operating our school. The Annual Fund is a critical source of revenue for covering this gap. The Frederica Academy Annual Fund helps make tuition more affordable for more families while offering parents a tax-deductible benefit for at least part of their investment in their child's education. Through gifts large and small, the Annual Fund supports our devoted faculty, our premier college counseling program, our athletics offerings, our arts opportunities and so many other positive differentiators that make Frederica Academy a vital part of the lives of our students, their parents, and our community.</p>
<p>Apogee Georgia School Choice Scholarship Fund (June - December)</p>	<p>Since 2009, Frederica Academy has raised nearly \$5.8 million through its partnership with the Apogee Georgia School Choice Scholarship Fund. The program allows Georgia taxpayers to receive a dollar-for-dollar income tax credit for contributions. In 2022, the Georgia General Assembly increased the maximum contribution amount for each tax filing status and also raised the state-wide cap to \$120 million. For the 2023 campaign, enrollment opened in June 2022, and we race to make sure that everyone is signed up before the first of December. Payments will be due in March 2023. You do not have to be a Frederica family to participate, but you must have Georgia state income tax liability. Interested participants are encouraged to discuss the program with their CPAs and tax advisors.</p>
<p>21st Annual Derby Day (May 6, 2023)</p>	<p>An annual, much anticipated event in the Golden Isles, Derby Day is Frederica Academy's signature fundraiser that includes a Live and Silent Auction as well as a Best Derby Day Hat contest! Derby Day is a line item in the school's annual budget, and proceeds support everything from enrichment programs to daily operating expenses. If the budgeted amount is exceeded, this provides an opportunity for additional improvements and enhancements. Each year, a percentage of proceeds is diverted to the endowment.</p>
<p>Restricted Giving / In-Kind Support (ongoing)</p>	<p>Donors, in consultation and coordination with the Advancement Office, may give donations that are earmarked for a specific program/ investment or may give a pre-approved in-kind donation to the school. Examples of possible programs to support are the arts, academic programs, athletic initiatives, and many others.</p>
<p>Friends of FA (ongoing)</p>	<p>The Friends of FA Fund offers the opportunity for donors to provide support to students who qualify for maximum financial aid as well as to supplement other school expenses where needed, expanding Frederica's ability to attract students who will clearly benefit from a Frederica Academy education but require substantial need-based assistance.</p>
<p>Planned Giving / Legacy Gifts (ongoing)</p>	<p>Planned gifts are custom-designed gifts that offer tax advantages to donors while providing long-term financial support for the school. Frederica established the Frederica Forever Fund to allow donors the ability to invest in Frederica through gifts of bequests, qualified retirement plans, annuities, trusts, and insurance policies.</p>
<p>Booster Club (ongoing)</p>	<p>The Booster Club supports Frederica Academy's athletic programs and promotes positive parent and community involvement in support of all the school's athletic programs. Revenue generated from memberships and advertising supports all FA athletic programs.</p>
<p>Parent Association (ongoing)</p>	<p>All FA parents are members of the Parent Association, and there are no dues. Each fall, the Parent Association sells poinsettias and holiday greenery as a fundraiser to support its operations and to help fund special projects for the school. Additionally, the Parent Association coordinates affinity programs with Harris Teeter, Lands' End, and AmazonSmile.</p>
<p>Friends of the Arts (ongoing)</p>	<p>The FA Friends of the Arts affinity group is a platform for stakeholders to get involved and support our Fine Arts programs.</p>
<p>Gateway Capital Campaign (Began in January 2022)</p>	<p>The school has embarked on a \$10 million capital campaign entitled The Gateway Campaign, which is designed to fund the first set of projects identified and prioritized in campus master planning work. Those projects together will be transformational and include, but are not limited to, an expansive, multipurpose pavilion and quadrangle plaza on the east side of campus; an extension of the Lower School to include an expanded Kindergarten classroom, an additional classroom, and a school-wide counseling center; an expansion and renovation of the Middle School parking lot; a new 9,600 square-foot Upper School academic building that will house seven innovative classrooms; a covered, year-round outdoor "bistro" setting between Hamilton Hall and the gym that provides dining seating for nearly 100 students; a completely renovated Hamilton Hall (present cafeteria); an entirely new landscaping design for the interior courtyard between the Lower School and Fleming Hall classroom corridors; and the creation of additional and enhanced athletic facilities proximate to and surrounding the baseball complex.</p>

KEY DATES	LEVELS OR CATEGORIES	PROCESS
<ul style="list-style-type: none"> Donors are encouraged to enroll in the Annual Fund prior to December 31, 2022. 	<ul style="list-style-type: none"> Gifts of all sizes are much appreciated. Gifts \$1,000 or larger qualify as Benefield Society gifts. 	<p>Chairs: Mary Margaret and Jeff Shiver</p> <p>Complete enrollment form and return it to: Frederica Academy Advancement Office 200 Murray Way, St. Simons Island, GA 31522 <i>Participants may also enroll online.</i></p> <p>John Pope - johnpope@fredericaacademy.org</p>
<ul style="list-style-type: none"> Online enrollment available June 2022 for the 2023 program. Apogee Appreciation Week is in November each year. Donors are encouraged to enroll early by December 2022. Payment due in March 2023. 	<p>NOTE: Increased limits this year</p> <ul style="list-style-type: none"> Individual filer (\$2,500) Married individual filing separately (\$2,500) Married couple filing jointly (\$5,000) Member of an LLC (\$25,000) Partner in a Partnership (\$25,000) S-Corp (Up to 75% of Georgia tax liability) C-Corp or Trust (Up to 75% of Georgia tax liability) 	<p>Co-Chairs: Joel Arline and Kristi Harrison</p> <p>Enroll for Apogee at https://www.apogeebase.com/donate</p> <p>Brad Hutcherson bradhutcherson@fredericaacademy.org</p>
<ul style="list-style-type: none"> Sponsorships available in February 2023. Derby Day will take place on Saturday, May 6, 2023. 	<ul style="list-style-type: none"> Underwriter - \$10,000 Triple Crown - \$5,000 Winner's Circle - \$2,500 Turf Club - \$1,000 Jockey Club - \$500 Individual Event Tickets - \$150 	<p>Co-Chairs: Lauren and Parker Lavin / Katie and Jason Widener</p> <p>Brad Hutcherson bradhutcherson@fredericaacademy.org</p>
<ul style="list-style-type: none"> Gifts can be given at any time. 	<ul style="list-style-type: none"> Donor's discretion 	<p>Transmit payment to Advancement Office and designate purpose of gift.</p> <p>John Pope - johnpope@fredericaacademy.org</p>
<ul style="list-style-type: none"> May not be directed to a specific student. 10% of all donations will be transferred to the endowment of Frederica Academy. 	<ul style="list-style-type: none"> Donor's discretion 	<p>John Pope - johnpope@fredericaacademy.org</p>
<ul style="list-style-type: none"> Dictated by donor and should be done in consultation with legal and/or tax advisor. 	<ul style="list-style-type: none"> Donor should seek legal and/or tax advice regarding gift amount. 	<p>Donations to Frederica Academy via a trust, annuity, insurance policy, or a bequest.</p> <p>John Pope - johnpope@fredericaacademy.org</p>
<ul style="list-style-type: none"> Members receive free family admission to all regular season, home competitions. 	<ul style="list-style-type: none"> Membership levels start at \$250. Sponsorships are also available and are listed on the 2022-2023 form. 	<p>Complete membership form and return it to: Frederica Academy Booster Club 200 Murray Way, St. Simons Island, GA 31522</p> <p>Jenny Thompson, Booster Club President paulandjenny@bellsouth.net</p>
<ul style="list-style-type: none"> Poinsettias and greenery delivered the first week of December. 		<p>Parent Association Co-Presidents Meredith Flagstad - mjflagstad@gmail.com Kimbrough Haverstock - kimbroughm@gmail.com</p>
<ul style="list-style-type: none"> Gifts can be made at any time 	<ul style="list-style-type: none"> Donor's discretion 	<p>Tess Nielsen - tessnielsen@fredericaacademy.org</p>
<ul style="list-style-type: none"> Gifts can be made at any time 	<ul style="list-style-type: none"> Gifts may be made in the form of a 1, 2, or 3-year commitment 	<p>John Pope - johnpope@fredericaacademy.org</p>

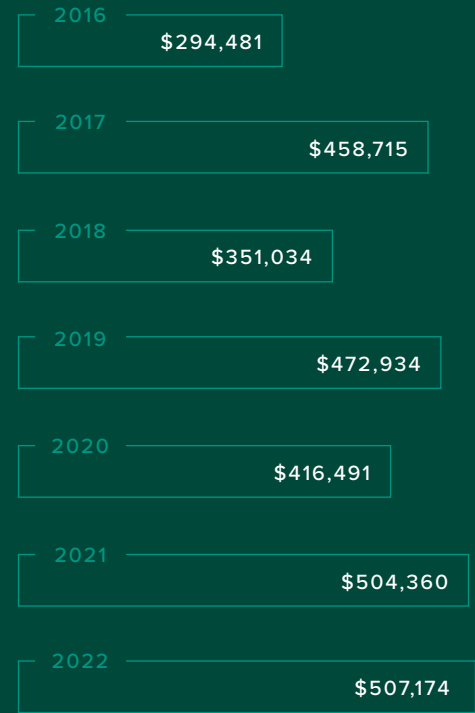
ANNUAL FUND

The Annual Fund is the primary source of unrestricted donor funds when needed to help ensure a balanced operating budget. Surplus Annual Fund revenue creates new opportunities to enhance student experiences, improve classroom and campus facilities, and make important programmatic, capital, and professional development investments.

Through gifts large and small, the Annual Fund supports our devoted faculty, our premier college counseling program, our athletics offerings, our arts opportunities, and so many other positive differentiators that make Frederica Academy a critical part of the lives of our students, their parents, and our community. Large gifts help meet and exceed our fundraising targets. Small gifts demonstrate broad stakeholder confidence in the school.

The FA Annual Fund also helps make tuition more affordable for more families while offering parents a tax-deductible benefit for at least part of their investment in their child's education. By supporting the Annual Fund today, donors help underwrite success throughout all grades and divisions for both current and future students.





Annual Fund Results Over the Years



APOGEE

Apogee is a 501(c)3 nonprofit organization with a special SSO (Student Scholarship Organization) Georgia designation, which allows Apogee to provide its contributors with a dollar-for-dollar Georgia tax credit. Apogee is Frederica Academy's tax credit SSO partner. Georgia taxpayers can direct their state tax dollars to Frederica Academy as opposed to the State Department of Revenue.

In the spring of 2022, the governor signed Georgia HB 517, increasing the maximum contribution amounts for taxpayers.

-  Enroll Online (June-December 2022)
-  Receive State Department of Revenue Approval (January 2023)
-  Make Payment (By March 2023)
-  Receive Dollar-for-Dollar Georgia Tax Credit (When Filing 2023 Taxes)

Individual filer

Max Contribution - \$2,500

Married individual who files separately

Max Contribution - \$2,500

Married couple filing jointly

Max Contribution - \$5,000

Member of an LLC

Max Contribution - \$25,000

Partner in a Partnership

Max Contribution - \$25,000

S-Corp

Up to 75% of Georgia tax liability

C-Corp or Trust

Up to 75% of Georgia tax liability

Insurance Companies that Pay Taxes on Premiums

75% of premium tax paid in GA (Premium tax is 2.25% of gross direct premiums collected in that tax year)