

Guide to Engagement & Philanthropy



ST. MARY'S
SCHOOL



Meet The Team

Sharon Taylor, Chief Advancement Officer

Christine Downie, Director of Development

Virtue Byrd, Director of Capital Campaigns & Alumni Relations

Kristie Kender, Parent Engagement & Events Manager

Carole Blake, Development Assistant

Guide to Engagement & Philanthropy

Dear St. Mary's Community,

I am thrilled to start the 2022-2023 school year serving in my new role as Chief Advancement Officer for the St. Mary's Development Department. Having served as Head of School for the past eight plus years, and in various roles since 1995, I have witnessed first-hand the impact that a gift of support can have within our school community. I am eternally grateful for the strong philanthropic support St. Mary's has been blessed with for 28 years. Our school is in an incredibly strong and healthy position and we remain steadfast in preparing and inspiring our students to become courageous, caring global citizens and enlightened leaders of tomorrow.

On behalf of the Development team, thank you for the support that you provide to St. Mary's School. We truly value the partnership with our families and the opportunity to engage with our unique community. Your commitment to our school allows us to consistently deliver a transformational educational experience for all students. This strong sense of community, where family and school come together, defines St. Mary's and sets us apart. We are incredibly appreciative of the support we receive from our parents, alumni, parents of alumni, grandparents, faculty, staff and friends.

While this Guide to Engagement and Philanthropy outlines how you can engage with the school and make a philanthropic impact at St. Mary's, please feel free to reach out to me or my colleagues with any questions. Better yet, stop by and visit with us - our doors are always open.

We are extraordinarily thankful to those who invest their valuable resources in our school and in doing so create broader learning opportunities for students to cultivate their world-sized hearts and world-class minds. Thank you again for your support and belief in our community.



Sharon Taylor
Chief Advancement Officer



COMMUNITY: Parent Engagement And Fellowship

One of St. Mary's strengths is a continued sense of community among students, families, faculty and staff. We are a welcoming campus, which supports and encourages family engagement. Every St. Mary's parent is a member of the Parent Teacher Fellowship (PTF). We value building community through volunteering and planning meaningful events and activities on and off campus. Being actively involved at school is a great way to make friends and become more ingrained into the St. Mary's community. There are many opportunities to volunteer in a variety of ways. All strengths, time and talents are welcome!



Our PTF Board is a leadership group that commits to serving our school in various positions to ensure that we fulfill our mission of supporting the educational, fundraising, cultural, physical and spiritual needs of St. Mary's.

In addition to the many school related events throughout the year, our PTF Board and the St. Mary's Development Department is committed to providing events that foster community, engage our families and show our appreciation for the support of our school.



2022-2023 Marquee Community Events

Friday, September 30
Founder's Day

Friday, November 11
St. Mary's Golf Classic

Thursday, December 8
Winter Festival

Saturday, March 25
St. Mary's Spring Gala

Wednesday, May 24
Design Night

Get Involved

Volunteer Opportunities are outlined on the Parent Resource Board.

For more information on how to get involved, please contact:

Kristie Kender
Parent Engagement
& Events Manager
(949) 448-9027 x328
kristie.kender@smaa.org





PHILANTHROPY

For 28 years, St. Mary's School has benefited from the generosity of our community. The campus and programs we enjoy today are the result of the philanthropy of those families who came before us. We depend on your annual gift to augment current expenses in addition to specific donations toward capital improvements to ensure a strong future for the next generation of Falcons. Your ongoing support, beyond tuition, directly impacts every student's experience.



The St. Mary's Fund is the single most important philanthropic priority for our school. If you make one gift to the school each year, please make it to St. Mary's Fund. The St. Mary's Fund is one of the school's primary sources of operating income and as such ensures the strength and success of our programs. Your donation supports low student-to-faculty ratios and our ability to hire exceptional faculty to carry out our mission of developing world-sized hearts and world-class minds.

The St. Mary's Fund is put to work immediately to support the school. The Fund impacts every aspect of a St. Mary's education, from financial aid to faculty professional development, academics to athletics, technology to the arts.

**ST. MARY'S
FUND**
MAKE A WORLD OF DIFFERENCE

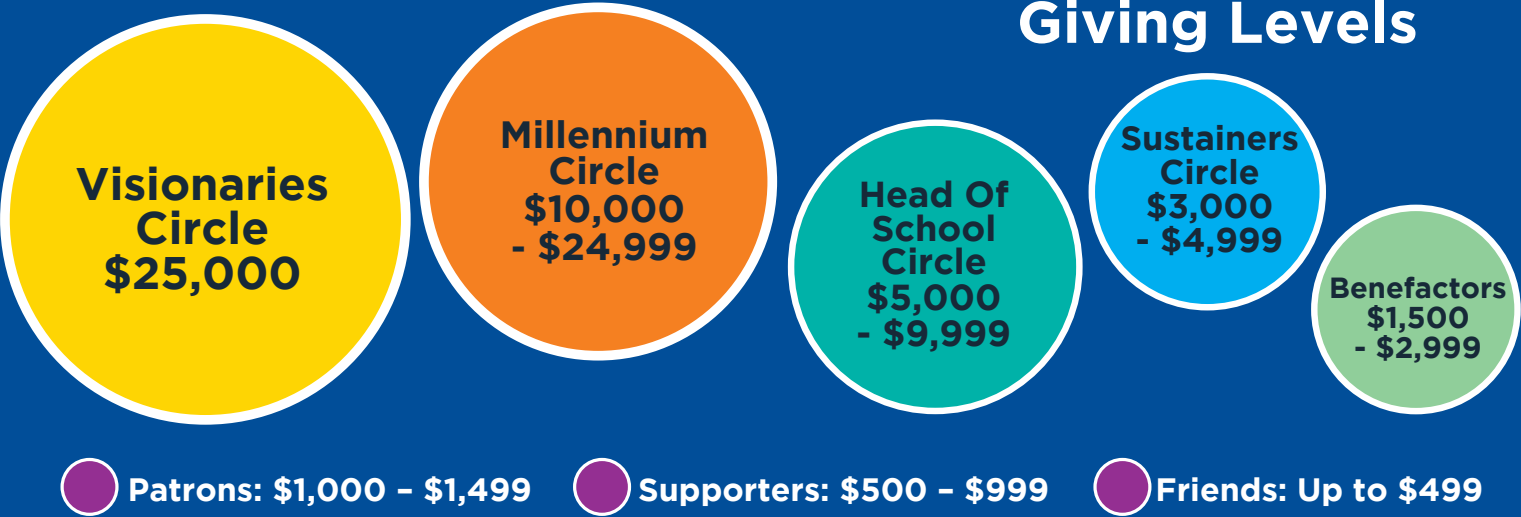


St. Mary's Fund

This funding is imperative to the health of our school. **Healthy funds represent the difference between a solid education and a truly exemplary one, where innovative ideas and state-of-the-art resources for teaching and learning practices are not held back by operating budget constraints.**

St. Mary's relies on contributions to the St. Mary's Fund every year from Trustees, parents, grandparents, alumni, faculty and staff. It is our expectation that 100% of our families partner with us in providing our students with an exceptional educational experience by contributing to the St. Mary's Fund. How much each family contributes is a personal decision. Our hope is that every family is able to be as generous as possible given their financial circumstances. Gifts range from under \$1,000 to over \$25,000. Every gift, of any size, has a direct impact on all St. Mary's School students.

Giving Levels



Donors at the \$3,000 level and above are invited to the Fall Leadership Reception. All donors are recognized in our Report on Philanthropy.



Enhancing Learning Through Diversity

St. Mary's Scholar Program

Launched in 2019, by a generous St. Mary's family, the St. Mary's Scholar Program seeks to provide access to our unique learning environment for students that otherwise would not be able to attend the school. The program provides full-tuition scholarships for the entire three years of Middle School to qualified students and supports their engagement in student life.

The St. Mary's Scholars Program aims to attract students from diverse economic and cultural backgrounds to St. Mary's. Qualified students earn a needs-based scholarship that covers 100% of their St. Mary's experience. The Scholars Program is comprehensive, accounting for all of the extra costs beyond tuition—



ST. MARY'S SCHOOL SCHOLAR PROGRAM

such as transportation costs, books and course materials, athletic uniforms, and one International Field Study—to make sure scholar students have access to the full educational experience at St. Mary's.

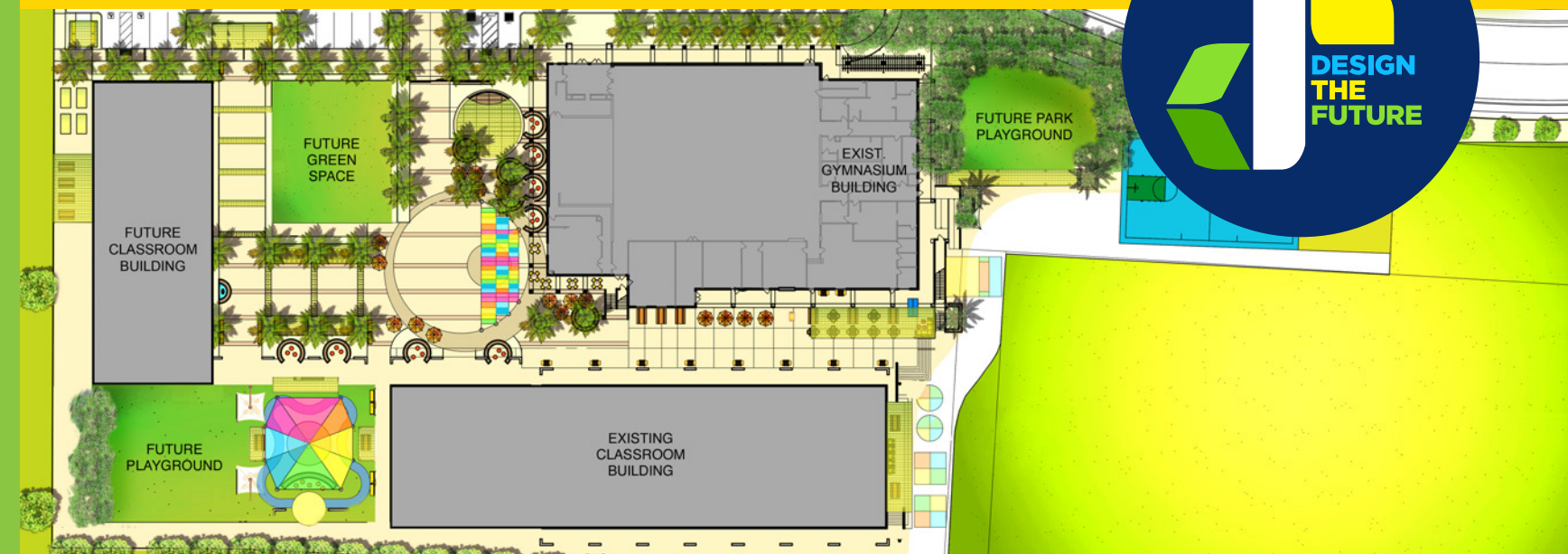
The St. Mary's Scholar Program offers a significant opportunity for families that share our belief in the power of diversity and who seek to make this kind of profound impact. This program provides scholarships for six outstanding Middle School students – two in each grade. Through these scholarships, not only will the lives of these children and their families be changed, but the entire St. Mary's community will be changed for the better.

Capital Campaigns

To accommodate growth and meet the educational needs of our students, St. Mary's periodically mounts capital campaigns with the goal of reshaping the learning environment, enhancing programs and building endowment. In the spring of 2017, St. Mary's launched the Imagine More Campaign to reimagine our spaces and transform the campus. Opening in 2018, the Bhathal Merage Academic Center was renovated to spark our student imaginations and ignite their love of learning. Within the Bhathal Merage Academic Center, the Bauer Arts Wing and the Purcell Family Science and Technology Wing allow for creative and innovative thinking and learning. The Green Family Commons introduced a dining experience that integrates our IB curriculum and promotes healthy eating. Our SeneGence Security entrance offers cutting edge school security and design. All of these reimagined spaces throughout the campus are truly transformative.

We are now ready to embark on a new multi-year, capital campaign to Design the Future and ensure our children reach their fullest potential. The Design The Future campaign seeks to invest in our campus environment, our innovative curriculum and our school community. The goal is to complete our Campus Master Plan by replacing the portable structures on campus with a permanent building. These investments are vital to our children's development and to the school's future.

You will be hearing more about this campaign in the years ahead. It is a manifestation of who we are and what we believe. It blends our vision for a world-prominent facility with our mission of nurturing world-sized hearts, world-class minds.



Ways to Give

CASH OR CHECK

Either as a single donation or as payments towards a pledge, simply make your check payable to St. Mary's and direct it to the Development Office.

CREDIT CARD

Make your donation or pay your pledge with a credit card online at www.smaa.org/give or visit the Development Office.

PLEDGES

Pledges are a popular way for families to demonstrate their commitment to support St. Mary's. Families can defer payment and maximize tax deductions. Pledges can be fulfilled by cash, check, credit card or securities in one installment or monthly installments before a specified pledge payment period or online at www.smaa.org/pledge.

MATCHING GIFTS

Many corporations demonstrate their support to St. Mary's by matching their employees' donations to our school. Matching gifts can double your contribution to St. Mary's. Donors are recognized for the total of the combined amount of their gift plus their employer's matching gift. Please consult your company's Human Resources Dept. to inquire about a matching program or the Development Office, so we can research that information for you.

GIFTS OF SECURITIES

Gifts of appreciated stock and/or securities represent a two-fold savings opportunity. Donors avoid paying capital gains taxes on the increased values of their stocks. In addition, donors receive a tax deduction for the full market value of the stock on the date of the gift.

PLANNED GIVING

Planned gifts are made now and distributed in the future. Including St. Mary's in an estate plan provides for long-term fiscal health for our school. Donors receive immediate or deferred tax benefits while leaving a legacy. All parents and grandparents are encouraged to consider naming St. Mary's in their will and making the school aware of their gift.

CORPORATE AND FOUNDATION GIVING

St. Mary's strives to attain grants and funding from foundations and corporate giving entities for school needs. Because these grants are quite competitive, it is extremely helpful to have a contact within the funding organization. Please let us know if you or your extended family has contacts with philanthropic agencies.

OTHER WAYS TO FINANCIALLY SUPPORT ST. MARY'S SCHOOL

- Gifts of tangible personal property
- Attend fundraising events
- Event sponsorship/underwriting
- Register your debit and credit cards with eScrip (ID 137122061) and your Ralph's grocery card (#80397); these stores will make contributions to St. Mary's when you use those cards
- Support St. Mary's when you shop on Amazon at smile.amazon.com.

How to Give



YOUR GENEROUS GIFT MATTERS

- Donate online at www.smaa.org/give or make a pledge at www.smaa.org/pledge
- Bring your donation to the Development Office
- Mail your donation to:
St. Mary's Development Office
7 Pursuit
Aliso Viejo, CA 92656

As a 501(c)(3) corporation, your gifts to St. Mary's are tax-deductible to the fullest extent allowable by law; tax identification number 33-0771131.

For further information regarding these opportunities, please contact Christine Downie, Director of Development at (949) 448-9027 x324 or christine.downie@smaa.org.



**ST. MARY'S
SCHOOL**

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