

THE POST OAK SCHOOL



Reaching the
GOAL!

2023-24 POST OAK FUND DRIVE

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



Scan the QR code to visit
postoakschool.org/donate.

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.

THIS YEAR'S FINANCIAL GOAL IS \$500,000

The Post Oak Fund begins October 7. We ask for responses to be returned by November 17, and all pledges are due by May 31, 2024.

Head of School Maura Joyce chairs this year's effort. She will work with captains from each class who will reach out to parents starting Oct. 7. They are available to answer any questions you have.

Because we get this question a lot: The average annual fund gift by Post Oak families last year was \$1,091.

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

Contributors of \$10,000 or more are recognized as *Founders Society* members and are invited to a special dinner in the spring with the head of school.

For additional response forms or to donate online, go to **postoakschool.org/donate** or contact the Development Office at 281-822-8024 or 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.

FINANCIAL APPROACH

The school operates in compliance with generally accepted accounting principles, which are audited annually. 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.

Post Oak's 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. Post Oak's "hard income" covers the school's core operating expenses.

The school's hard income, which includes tuition, fees, and investment income, are balanced 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 and maintenance 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 soft components for the school are the discretionary expenses that the school incurs every year. Soft expenses also include transfers to the board-designated endowment fund for the long-term stability of the school.



HOW HAVE WE DONE IN THE PAST?

In most years we achieve above 90% participation from the parent community, and 100% from employees and board members.

POST OAK FUND SHORT HISTORY				
YEAR	GOAL	CONTRIBUTIONS	ENROLLMENT	PARTICIPATION
2023	\$400,000	\$497,349	502	94%
2022	\$400,000	\$385,377	504	89%
2021	\$380,000	\$376,066	474	89%
2020	\$380,000	\$385,203*	513	95%
2019	\$340,000	\$375,523	514	97%
2018	\$330,000	\$364,000	524	93%
2017	\$300,000	\$337,000	492	98%

* Pandemic year. Additional Pandemic Relief gifts were received which are not reflected in this amount.

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 and facility repairs. The Post Oak Fund 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. 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 (which supports the library), and our alternating biennial events: The Gala and our Golf Tournament. (The 2023–24 school year is a Biennial Gala year.)

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 from Post Oak families last year was \$1,091. We received gifts from \$100 to \$25,000.

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 donor lists and to become a member of the Leadership Circle or Founders Society?

All contributors appear in our donor lists published in the summer magazine. Donations to the Annual Fund of \$3,000 or greater are recognized at the Leadership Circle level. Contributors of \$10,000 or greater are also members of our Founders Society. Gifts of \$1,000 to \$2,999 are recognized at the Family 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. You will be recognized on donor lists at the combined level.

What exactly is the “Endowment?”

About 20 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 to approximately \$3.5 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.

Ways to give to the Annual Fund:

- 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 GIVE button at the top of 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 or the *Founders Society* if your combined gift is \$10,000 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 2024 Post Oak Fund Cabinet

FUND CHAIR

Maura Joyce

Class Captains

BAGBY, LONDON	Sol D’Atri
BLESSMAN, CYNTHIA.....	Ana Leon Paez Othon & Jaime Suarez Hack Prestina
CEDILLO, IDELIZA	Shelina & Moiz Bhamani
DE LEON, SANDRA	Lisa Heyden
DICKSON, ELIZABETH	Christina Pappas
DURAN, REBECCA.....	Jessica & Josh Solera
FIGUEROA, SARAH.....	Zach Smith
HANSEN, EMILY	Kellen & Trevor Smith
HOLMAN MURTI, RENAE	Alyssa & Andrew Stephens
KLUK, ORLY	Polly Fohn
NICKERSON, KERI	Alison Altenberg
PREVOT & XU	Afshi Merchant
SMITH, KARYN	Niki Roberts & Krisa Benskin
TAJ MAHMOOD, ANITA.....	Oscar Parada and Valerie Volpi
TOWNSEND, TAMARA	Rob Johnson
VASQUEZ, SUANNY	Jelena Zhang
ZIEMNICKI, SARA ANN	Sonia Maredia
MIDDLE SCHOOL	Lisa Heyden
HIGH SCHOOL, 9 & 10.....	Charlotte Aguilar
HIGH SCHOOL, 11.....	Shirin Nazarani
HIGH SCHOOL, 12.....	Christy Zweig
BOARD.....	Maura Joyce
EMPLOYEES	Christina Kopanidis-Cantu

Your Class Captain is found under the class of your oldest child. Class Captains will be contacting you during our campaign from October through mid-November.

ANNUAL FUND AT WORK

This year's Annual Fund gifts will go toward several safety related projects:

- ♦ Replacement of the entire Bissonnet Campus fence and adding in automatic, remote controlled gates;
- ♦ New MDC speaker and panic button system;
- ♦ Cybersecurity audit and upgrades to keep all information safe;
- ♦ Upgraded security cameras on both campuses;
- ♦ Replacement of BC gym floor;
- ♦ And, re-roofing projects on both campuses.

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

- ♦ A newly turfed backfield at the Bissonnet Campus, which will also help with flood mitigation. Its base was dug two feet deep to act as a retention pond during flooding;
- ♦ Help to offset the \$700,000 cost of replacing of our 35-year-old HVAC air-handlers (BC);
- ♦ The finishing touches to our Museum District Campus (MDC) project: new learning spaces, a covered basketball court, a new tinker lab, and turfed quad;
- ♦ Increased professional development for teacher training;
- ♦ Increased financial aid;
- ♦ Support for the endowment.

We are deeply grateful for years of generous support from past Post Oak families who have helped the school become what it is today. Thank you!

The
POST OAK
SCHOOL



Bissonnet Campus: 4600 Bissonnet Street ▪ Bellaire, Texas 77401
Museum District Campus: 1010 Autrey Street, Houston, Texas 77006

www.postoakschool.org