GIVING & GETTING INVOLVED

A Guide to Giving
& Getting Involved
at Barrie School

Dear Parent/Guardian,

At Barrie School, every individual matters. We are dedicated to fostering your child's intellectual growth within a nurturing, close-knit community that prioritizes their physical and emotional well-being. Our commitment to fostering a love for learning is evident in the supportive and challenging educational atmosphere we cultivate.

Sustaining this exceptional learning environment requires a collaborative effort between teachers, administrators, staff and parents. While tuition covers the basics, the true cost of providing an outstanding education involves so much more. We have prepared this *Guide to Giving and Getting Involved* to offer you a comprehensive overview of the various ways you can engage with and support Barrie School.

Your involvement, whether through your time, expertise, or financial contribution, plays a vital role in shaping your child's success at Barrie. We encourage you to share your talents and passions with us—every contribution, no matter how small, enriches our community and benefits our students.

Thank you for entrusting your child to Barrie School and for believing in our mission. We look forward to partnering with you in nurturing the next generation of leaders and innovators.

Respectfully,



Ben Thrash
Head of School



Educating a child requires an exceptional faculty, a curriculum that develops fluency, creativity and competency, and the generous involvement of parents.



A GENEROUS COMMUNITY SUPPORTS BARRIE SCHOOL'S MISSION

Each Barrie School family plays an important role in the school community. Parents/Guardians share the responsibilities of meeting the school's educational goals as well as ensuring a soundly governed and financially healthy institution.

We encourage parents to actively participate in daily school life. Through volunteer opportunities, special events and fundraising efforts, the school provides a variety of ways to become involved. Parents volunteer in classrooms, attend conferences, special events, extracurricular activities and donate through the school's giving campaigns.

> *Barrie has provided a rich environment for our family and not only provides an excellent education, but more importantly, provides a dynamic community for growth. Our family has thrived in the Barrie community, and we show our appreciation and commitment by giving our time, talent and treasure. We hope that our time spent at Barrie will allow this great institution to continue to thrive for years to come and we invite you to join us!"*
>
> —Lower School Parents

Partners in POSSIBILITY
BARRIE SCHOOL ANNUAL FUND

The primary way for alumni, parents, grandparents, alumni parents, and friends to support the annual operations of our school is to make a gift to the Annual Fund. By giving, you help us take advantage of mission-driven, real-time innovations that keep a Barrie education dynamic–both in and out of the classroom. These are direct benefits to our students right now and enhance their lives on Barrie's campus every day. Annual participation is strongly encouraged at a level that is most comfortable for your family.

GIVING LEVELS

Leadership Circles

Visionary Circle
$50,000 +

Sustainers Circle
$25,000-$49,999

1932 Founders Circle
$10,000-$24,999

Head of School Circle
$5,000-$9,999

Builders Circles

Capstone Circle
$2,000-$4,999

Bridge Circle
$ 500-$1,999

Cornerstone Circle
up to $499

Collegiate Circle
Alumni in College

WAYS TO GIVE

Pledges/Recurring Gifts
Pledges are an easy way for families to demonstrate their giving commitment early in the Annual Fund campaign. A pledge allows you to delay payment for a later date that works best for your family or maximizes a tax deduction. Pledges can be made at **barrie.org/annualfund,** and can be fulfilled by cash, check, credit card, or securities in one installment or monthly installments.

- A $10 monthly gift from September to June is a $100 gift
- A $50 monthly gift from September to June is a $500 gift
- A $50-100 monthly gift puts you in Barrie's "Bridge Circle"
- A $500 or more monthly gift qualifies for a "Leadership Circle"

Matching Gifts
Many companies demonstrate their support by matching their employees' donations to Barrie School. Matching gifts can double your contribution to Barrie! Donors are recognized for the total of the combined amount of their gift plus their employer matching gift. Check with your HR Department to see if they offer matching gifts and double your impact! Remember that spouses and retirees are often included.

As Barrie School parents and true believers of Montessori education, it is a pleasure to support and give to this stellar institution. Barrie is my children's happy place! Their love for this school and their educators is a testament to Barrie's dedication to creating a safe, enriching and nurturing environment. We value the effort it takes to keep this magic alive and are happy to be part of the thread that contributes to this handiwork!"

—Lower School Parents

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. By including Barrie School in your estate plan, you are not only leaving a legacy, but providing for the long-term fiscal health of our school and receiving immediate or deferred tax benefits. All parents and grandparents are encouraged to consider naming Barrie School in their will and making sure the school is aware of their gift.

Corporate and Foundation Giving
Barrie School applies for grants and funding from foundations and corporate giving entities annually. Because these grants are quite competitive, it is extremely helpful to have a personal connection within the funding organization. Please let us know if you or your extended family has any contacts with philanthropic agencies within your/their network that you are willing to share.

Other Ways to Financially Support Barrie School

- Gifts of tangible personal property (in-kind gifts)
- Attend fundraising events
- Event Sponsorship/Underwriting
- Sponsor a Flag

For further information regarding these opportunities, contact Director of Development Marion Entwisle at (301) 576-2822 or mentwisle@barrie.org and/or talk to your broker or tax advisor.

Giving Grid: A Giving Recap

	PURPOSE	TIME FRAME
TUITION	Primary source of operating revenue for Barrie School.	Assessed annually.
ANNUAL FUND	Should provide 6-7% of the operating budget that funds programs for students & faculty.	Fall kick-off, Giving Tuesday, Annual Benefit, and other opportunities throughout the year.
CAPITAL & RESTRICTED GIFTS	Gifts are designated to a specific purpose. This can include gifts towards a long-term building project or program.	Requests are made as needs arise.
ENDOWMENT & PLANNED GIFTS	Income from the Endowment supports operating and restricted expenses.	Gifts are accepted year-round.

DESIGNATION	SOLICITATION	PAYMENT METHODS	IMPACT
Each tuition dollar is allocated by a budget approved by the Board of Trustees. No designation can be made.	School sends reenrollment invitations in February requiring a $1000 deposit.	Payment Plans with check, CC (for deposit only), or auto withdrawal.	Provides the funds for the majority of the School's operating budget.
Can be designated to Financial Aid, Classroom Materials, Experiential Education, Professional Development or where Barrie needs it most.	Direct mail, email, text messages, flyers,and follow up by parent volunteers & staff	One-time gifts or recurring pledge payments by check, CC or stock transfer.	Annual Fund directly funds the difference between tuition and the actual cost of educating a child at Barrie.
Capital gifts and restricted gifts are designated for a specific purpose by the school or donor with approval by the school.	Often made through personal meetings with school leadership.	One-time gifts or recurring pledge payments by check, CC or stock transfer.	These gifts have a huge impact on the Barrie campus and community. You are investing in the future of the school.
Endowment funds or planned gifts can be either unrestricted or donor designated to a specific area approved by the school.	No direct solicitation. Contact the Development Office for more information.	Check, CC or stock transfer. For more information, contact the Development Office.	Endowments are permanent assets that provide annual income to improve Barrie's financial stability.

FINANCIAL OVERVIEW

Barrie School is committed to prudent financial planning, and as an independent school, receives no financial support from federal, state, or local governments. The sole sources of revenue are tuition, charitable gifts, income from invested reserves, and proceeds from special activities and programs. Like all independent schools, Barrie must raise additional funds beyond tuition revenue to balance the budget and provide for the future.

Our annual giving program directly impacts our greatest assets, our students and teachers.

Barrie School Annual Fund FAQs

Q. I already pay tuition, so why am I asked to donate to the Annual Fund?
A. Your gift supports the people and programs that make Barrie School special. Gifts are critical because tuition alone does not cover all the educational opportunities your child receives throughout the school year. We need your gift to help fill the gap.

Q. Why not just raise tuition?
A. Barrie School, like all independent schools, relies on an annual fund campaign to meet school needs. Simply increasing tuition could make a Barrie education out of reach for many. We value a community of learners who are diverse in many ways. Families often prefer to meet this need with a tax-deductible gift.

Q. Why are donors encouraged to give early in the school year?
A. A gift or a pledge made early is a great advantage to our school as it provides funds to support the current school year. Because of this, we ask donors to consider making pledges or contributions by December 31. We are seeking "100% participation in 100 days!"

Q. Why is parent participation so important?
A. Each year, Barrie receives annual gifts ranging from $10 to more than $50,000. While large Leadership level gifts are crucial to our financial stability, gifts of every size add up and have a significant impact. Parent involvement sends a powerful message to the greater community. Our goal is to have 100% of parents participating in annual giving. We expect the same commitment from our trustees and faculty/staff.

We understand that within a school year, you will be given many opportunities to give. Your participation is essential to the success of the community. It also demonstrates to grant funders that everyone at Barrie School is invested by making the school a top philanthropic priority for your family.

GETTING INVOLVED

One of the strengths of Barrie School is a strong sense of community among our students, families, faculty and staff. We are an inclusive campus that supports and encourages everyone to participate and get involved.

The primary organization at Barrie School for parent/guardian involvement is the Barrie Family Association (BFA), formerly known at the PTO. The BFA provides a vital link between the school and the families we serve. Tasked with encouraging communication and fostering community among school faculty/staff, parents/guardians, and students, the BFA's numerous committees, volunteer and fundraising activities, and annual calendar of events ensure an abundance of opportunity for involvement in ways both large and small.

We understand that every family has a different schedule and availability. Whether you are available for an hour a week, a day, a month, or more, before school, during school or after school, we have a volunteer opportunity that will allow you to participate in a way that's best for you. Volunteer opportunities are communicated through the all-school newsletter, dedicated emails, as well as through your class or grade representative(s).

There are many opportunities to volunteer and in a variety of ways. All strengths, time, and talents are welcome! Being involved at school is a great way to make friends and become a more active member of our community. Without your commitment and volunteer support, our events would simply not be possible!

COMMITTEES

- Welcome Back Pool Party
- Class & Grade Representatives
- Annual Fund
- Fall Festival & Homecoming
- Trunk or Treat
- Annual Benefit (Auction)
- BONDfire
- Greenhouse/Garden
- Parent Ambassadors
- Book Fair
- Summit for Social Justice
- Alumni Relations
- Skate Party
- Coffee Connections
- Teacher & Staff Appreciation

FOR MORE INFO & TO GET INVOLVED:



Tiffany Smith
Director of Community Engagement
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Marion Entwisle
Director of Development
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We look forward to your partnership in supporting our students through donations of your time, talent, and treasure!















THANK YOU, FAMILIES!
We couldn't do it without you!



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barrie.org