



POLY
TOGETHER

**Annual Giving
Volunteer Guide
2021–2022**



Welcome

The Advancement Office is thrilled to have you as part of our team! Together, **we inspire philanthropy and advance the vision of Poly** by fostering meaningful relationships within the Poly parent community.

You play a vital role in supporting **Poly's excellence**, and your efforts help to enhance the programs and initiatives essential to the student experience. Our goal is to conduct an Annual Giving campaign that is engaging and meaningful to our community, while being rewarding and fun for you, our volunteers.

In this guide, you will find helpful hints and tips, best practices, and resources and data to help you with your volunteer efforts. If you have any questions, please do not hesitate to reach out to any of our team members.

Why Give?

Everything you value about Poly is made possible by Annual Giving, and Annual Giving is only made possible with you. Participation at any level is an expression of your commitment to a truly diverse community, advancing excellence, and helping our students become intelligent, capable, and self-aware citizens, who are fully prepared to pursue their dreams and ambitions.

Annual Giving has practical benefits as well. By “bridging the gap” between tuition and operating expenses, Annual Giving keeps the cost to attend Poly more affordable. And unlike tuition, your gift to Annual Giving is 100% tax deductible.

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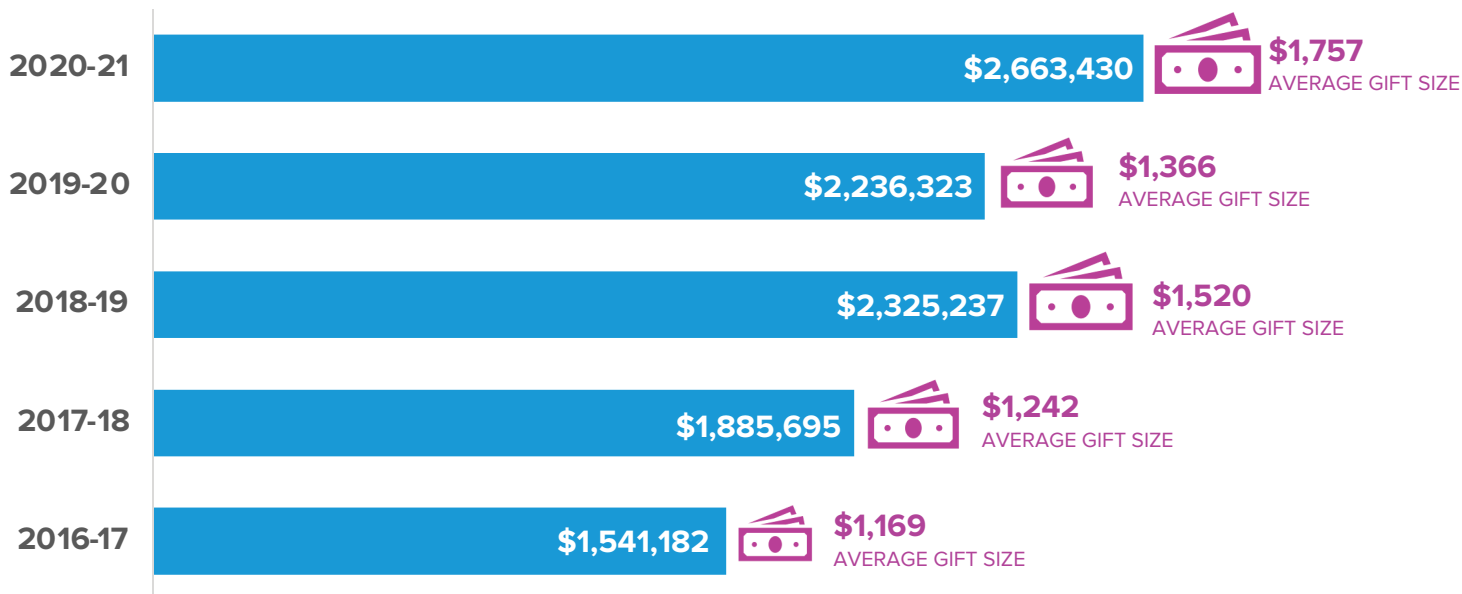


Annual Giving Goals

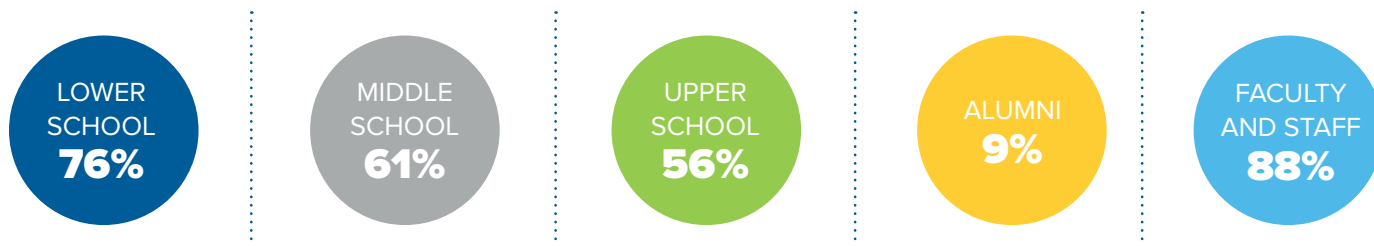
RAISE
\$2.5 MILLION

PARENT PARTICIPATION
100%

Annual Giving 2017-2021



Participating by Division 2020-2021

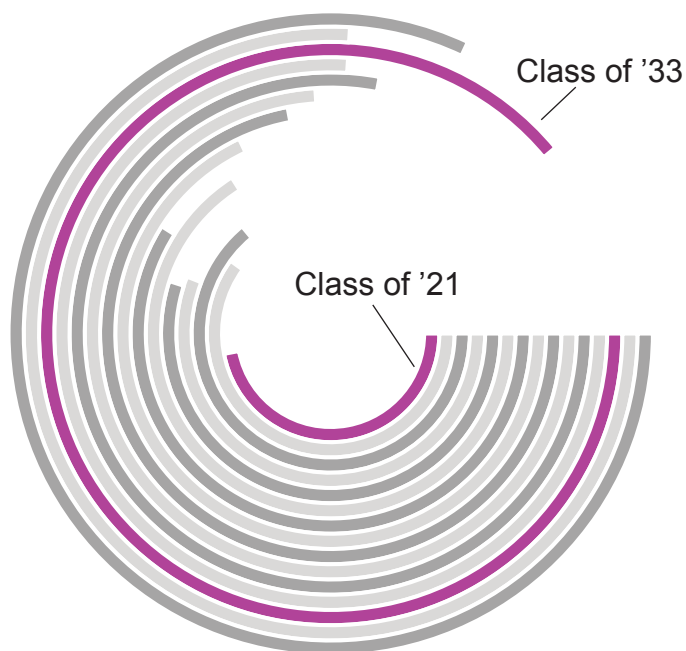


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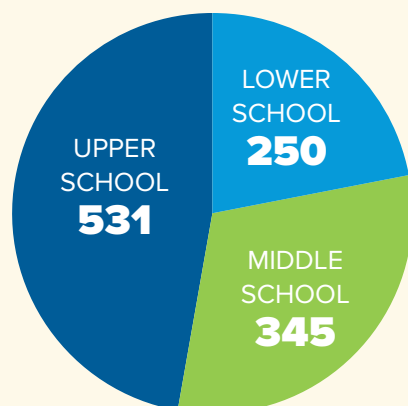
Annual Giving Goals

Participation by Grade 2020-2021



Class	Grade	2020-21 Participation
2021	12th	47%
2022	11th	60%
2023	10th	64%
2024	9th	56%
2025	8th	55%
2026	7th	66%
2027	6th	59%
2028	5th	68%
2029	4th	72%
2030	3rd	74%
2031	2nd	78%
2032	1st	76%
2033	K	89%
2034	PK	76%
2035	N	82%

Enrollment



\$9.7
million Awarded in
Financial aid for
2020-2021

21.5%
of Poly students
receive
financial aid

43%
of students
identify as
students of color

Giving Circles

Tower Society

The Tower Society recognizes annual leadership giving of **\$3,500 and above**, which significantly impacts the Poly community while simultaneously raising the bar for others.

- Visionary Leaders\$100,000 and up**
- The 1854 Society.....\$50,000 to \$99,999**
- Blue & Gray\$25,000 to \$49,999**
- Blue Devils.....\$10,000 to \$24,999***
- Poly Partners.....\$5,500 to \$9,999**
- Tower Level\$3,500 to \$5,499****
- Oasis Circle\$1,000 to \$3,499**
- Community Circle.....up to \$999**

*Donors giving \$10,000 or more will be recognized at the Leadership Donor Reception.
**Donors giving \$3,500 or more will be recognized at the Tower Society Reception.





Why Does Poly Ask for Gifts?

Understanding Poly's finances is the first step to understanding its need for support. Poly could not operate without the generosity of parents, alumni, parents of alumni, grandparents, faculty/staff, and friends.

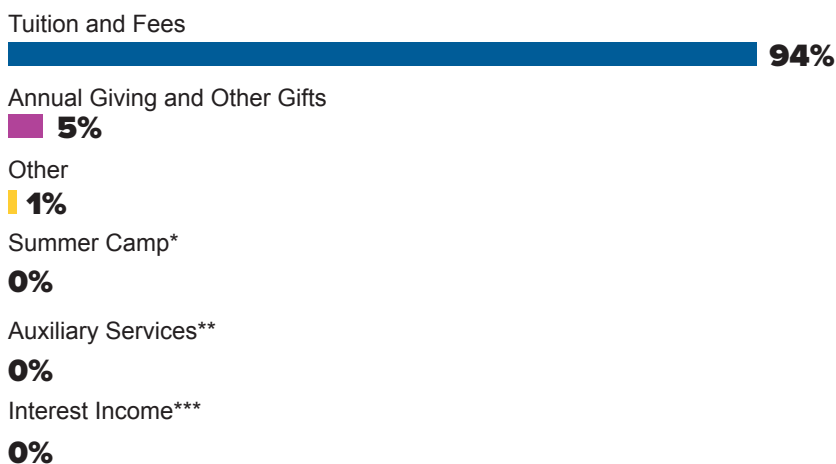
Annual Giving

Tuition alone does not cover the full cost of educating a Poly student. Annual Giving is essential because it provides **unrestricted income for use in the current school year**. Participation in giving at any level is the most important way the community can express their commitment to Poly and its students and teachers.

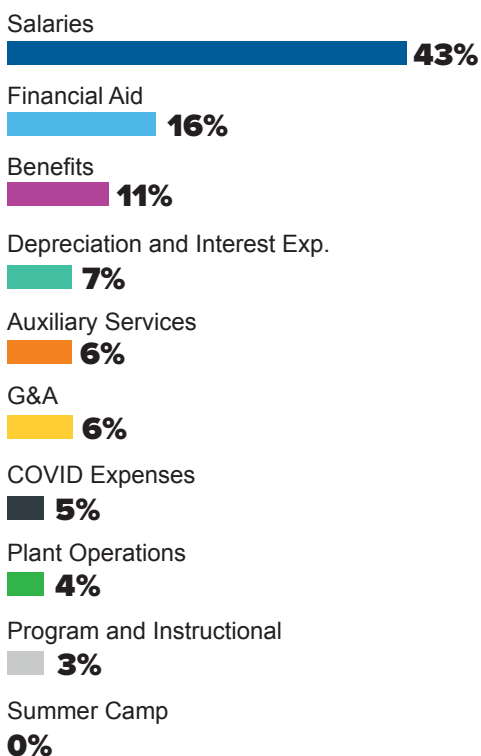
Endowment

Most endowment donors create their funds for specific purposes and Poly must use the income from each fund as the donor wished. Furthermore, only a small portion of the endowment can be spent in any given year. Endowment gifts are protected and create a steady income for the school year after year and are essential for the long-term financial stability of the school.

Income



Expenses



* '20-'21 school year; '19-'20 = 5%

** '20-'21 school year; '19-'20 = 1%

*** '20-'21 school year; '19-'20 = 1% (Endowment Income)

Annual Giving FAQs

What is Poly's Annual Giving?

Annual Giving is Poly's fundraising priority. This yearly initiative is essential to the school's financial well-being, making excellence possible across all programs. Annual Giving helps ensure the funding needed beyond tuition for the exceptional people and programs that define Poly's outstanding educational experience.

Who contributes to Annual Giving?

Annual Giving receives support from the entire Poly community—parents, alumni, grandparents, faculty, staff, friends, foundations, and matching gifts companies.

How much do I need to contribute to be a member of the Tower Society?

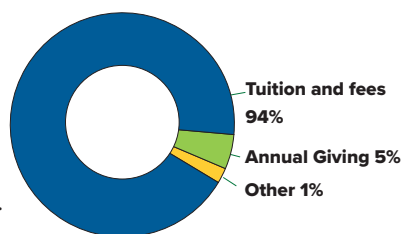
Families who give \$3,500 or more are invited to the Tower Society Reception with the Head of School. Donors at the \$10,000 level and above are invited to a special Leadership Reception.

Why do I need to contribute to Annual Giving? Isn't tuition enough?

Tuition represents 86% of the school's income. 14% is needed to reach 100% of what it needs to achieve its goals. Annual Giving provides some of the funding needed beyond tuition for the exceptional people and programs that define Poly's outstanding educational experience. Like all independent schools, Poly relies on the generosity of its community to fully fund the operating costs of the school.

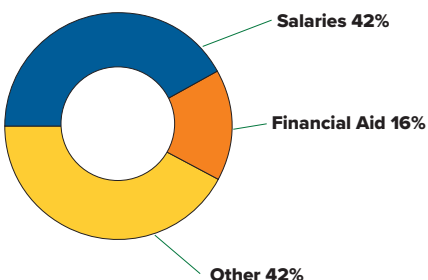
Tuition alone is not sufficient
Annual Giving is vital to close the gap between tuition and fees and the actual cost of educating each Poly student.

OPERATING BUDGET \$50M



Education is a human enterprise
Poly is people. Salary and benefits for faculty and staff account for 60% of operating expenses and financial aid comprises 20% of the budget.

OPERATING EXPENSES



Does my gift to Annual Giving support financial aid?

Yes! Annual Giving supports the school's operating budget, of which \$9.7 million is allocated for financial aid this year. The school could not offer this level of assistance without Annual Giving.

Why is participation so important?

We are dependent on the support of the entire Poly community to reach our goal. The involvement of every family demonstrates a belief in Poly's mission and dedication to the success of the school. This tradition of philanthropic giving by generations of parents, alumni, grandparents, faculty, staff, and friends has helped maintain Poly's high standards and kept it financially sound.

Are gifts to Annual Giving tax deductible?

Poly is a nonprofit, 501(c)(3) organization under the Federal IRS code. All contributions to Annual Giving are tax deductible.



Ways to Give

Online

By credit card by phone or online via the Annual Giving secure website, polyprep.org/annual-giving-2020-2021/

Credit Card

When taking a credit card donation, please record the following information:

Credit card type

(MasterCard, Visa, American Express)

- Credit card number
- Expiration Date
- Amount of gift

Donors can also call the Director of Annual Giving to make a gift over the phone.

Checks

Please instruct the donor to make their check payable to Poly Prep. Checks can be sent to Poly in the envelope that came with the letter, or to the following address:

Venmo

Please instruct the donor to find us through Venmo @PolyPrep or by visiting [Venmo.com/v/PolyPrep](https://venmo.com/v/PolyPrep)

CONTACT INFORMATION

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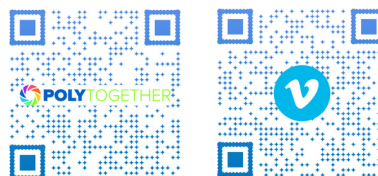
Stocks, Securities, and Wire Transfer

Please inform the donor that the Advancement Office will follow up in order to provide the appropriate types and information. Let someone in Advancement know that the donor mentioned one of these types of gifts to you so that proper follow-up will be provided in a timely manner.

Matching Gifts

Encourage everyone to double—or even triple—their gift to Poly by having their employer match their donation.

GIVE NOW



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