C.A.R.E. Campaign

Community of Anchorage Rallies for Education
Anchorage School

Rich in Tradition

Originally started in 1915, Anchorage School grew from its simple beginnings in the old girls’ seminary at what is now Bellewood Children’s Home to the sprawling campus as we know it today.
Anchorage School  
*Rich in Tradition*

However, during my first year as Superintendent, the Board and I found ourselves with a facility in a serious state of disrepair.
Background

• September, 1998 – property assessments came in $11,000,000 under May projection resulting in need to cut $100,000 from a general fund budget already staffed at higher revenue projection

• This was followed by low property reassessments in 1999 and 2000, both less than 4%
Background (Continued)

• Roof badly leaking and in danger of collapsing in several areas
• A/C units failing faster than repairs were possible
• Fire alarm system & emergency lighting system failing or not functioning at all
• Broken windows with glass panes falling unexpectedly around children
• Cracked 50-year-old boiler installed 30 years ago.
Background (Continued)

- Budget contingencies at minimal state requirements with no escrow for sick leave liabilities
- Maintenance budgets unable to cover critical needs
- Class sizes creeping up
- Special Services being reduced, i.e., primary science specialist, regular instructional assistants, etc.
Background (Continued)

- Enrollment increasing faster than construction could accommodate
- Increased bond payments draining the general fund
- Tax rates increased from 79.3¢ in 1990 to 98.2¢ in 2000.
- Non-school families moving away being replaced by families with school-aged children
We were headed into a downward spiral which, in the long-term, could even threaten the continued existence of the school as an independent school district.
Community Meeting

A community-wide meeting was held on June 8, 1999 to share the dilemma with the residents of the school district.

Outcomes:
• Need for Five-Year Budget Projections
• Suggested “user” fees, i.e., supply fees, extra-curricular participation fees
• Need for a fundraising Campaign
• Community-wide show of support
Under the Leadership of the members of the Anchorage Board of Education and five energetic school parents, C.A.R.E. was born:

- Diane Toop
- Jane Brown
- Debbie Doering
- Nique Freese
- Lucy Spickard
- Travis Cochran
- Tom Cottingham
- Susan Turner
- David King
- Kim McClure
Anchorage School
Rich in Tradition

Because the Board realized that the failure to address the needs of the facility any further would only compound the financial problems of the district, something had to be done.
Anchorage School
Rich in Tradition

Since the indisputable deteriorating condition of the building would ring home with all our residents, both school families and non-school families, it was decided that the facility would be the focus of the campaign.
Anchorage School

Rich in Tradition

Without the drain of facility costs on the general fund, further programmatic cuts could be averted and some level of financial stability could be attained.
The Campaign

After intensive planning, the CARE Committee decided that a personal, small group approach would best address the demographics of our community.
The Campaign

Individual rallies were scheduled at 23 homes, primarily school families, but also some non-school families. The first was held at the home of Joe and Sandy Petrone on July 25, 2000.
C.A.R.E. Rallies

• 7/25/00 - Joe and Sandy Petrone
• 7/27/00 - Larry Cashen and Susan Turner
• 8/1/00  - Don and Kirsti Fitzpatrick
• 8/3/00  - Susan and Bobby Clarkson
• 8/8/00  - Anne and Neil Ramsey
• 8/10/00 - Jenny and Stewart Hoertz
• 8/18/00 - Roxanne and Greg Brendel & Suzy and Jim Grubbs
• 8/24/00 - Lisa and Campbell Ewen
• 8/29/00 - Betty and Curt Richards
• 8/29/00 - Lucy and John Spickard
• 8/31/00 - Julie and Ben Schmidt & Kim and Brett McClure

• 9/7/00  - Jennifer and Jonathan Blum
• 9/12/00 - Liz Ferguson
• 9/15/00 - Melissa and Babak Manoucherhri
• 9/19/00 - Laura and Gary Sisler
• 9/21/00 - Rita and Doug Carlisle
• 9/26/00 - Ann and Ralph Walthall
• 9/28/00 - Jenny and Tom Cottingham
• 10/5/00 - Kyle and Mark Jackowitz
• 10/10/00 - Amy and William Abel
• 10/24/00 - Colleen and Todd Underhill
• 10/10/00 - Calvin and Brooks Pinney
• 11/17/00 - Rita and Mark O'Brien
The Campaign

Rallies were facilitated by:

• Jane Brown
• Debbie Doering
• Nique Freese
• Diane Toop, Board Chairman
• Larry Harrison, Superintendent
Did not want a high-profile, high pressure, highly visible campaign. Wanted to do it the “Anchorage Way.”

- Each family hosting a rally invited their neighbors and friends.
- Rally sites were selected to span the entire school district from neighborhood to neighborhood and reach every citizen.
- Every rally was intended to be very warm, personal and direct.
The Campaign

Campaign materials included:

- The “Why Care” position paper on the needs of the school, written by Susan Turner.
The Campaign

The CARE Campaign video made by Nathan Sangster and narrated by Bryan Rublein.
The Campaign

Campaign materials would include:

• Script
The Campaign

Campaign materials would include:

- Script
- How to Donate

HOW DO I GIVE?

- Your donation is tax deductible.
- Your donation amount is confidential.
- You may make:
  - A one-time pledge,
  - A one-year pledge with an option for quarterly payments, or,
  - A two-year pledge with an option for quarterly payments.
- If your company has a matching gift program, be sure to indicate that on the pledge card.
- The following companies have matching gift programs: UPS, Tricon, Brown-Williamson, National City Bank, Courier-Journal.
- If your employer is not listed, contact the Human Resources Department and ask if your company has a matching gift program.
- The School can accept donations of stock.
  - Contact your broker. Re-title the stock to: Anchorage Independent Board of Education.
- The School’s broker is:
  - Contact your tax professional for guidelines on charitable deductions.
The Campaign

Campaign materials would include:

• Script
• How to Donate
• Donation Guide

- If every school family* donated $3,333 to the CARE Campaign we would reach our goal of $900,000.

<table>
<thead>
<tr>
<th>$3,333 Donation</th>
<th>One-Year Pledge</th>
<th>Two-Year Pledge</th>
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</thead>
<tbody>
<tr>
<td>Monthly Amount</td>
<td>$278</td>
<td>$139</td>
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<tr>
<td>Quarterly Payment</td>
<td>$834</td>
<td>$417</td>
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</table>

*Assumes 270 school families

- A $5,000 donation would mean:

<table>
<thead>
<tr>
<th>$5,000 Donation</th>
<th>One-Year Pledge</th>
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</thead>
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<tr>
<td>Monthly Amount</td>
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<td>$208</td>
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<tr>
<td>Quarterly Payment</td>
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- A $10,000 donation would mean:

<table>
<thead>
<tr>
<th>$10,000 Donation</th>
<th>One-Year Pledge</th>
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</thead>
<tbody>
<tr>
<td>Monthly Amount</td>
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<tr>
<td>Quarterly Amount</td>
<td>$2500</td>
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Charitable Donee Status

The District qualified as a charitable contribution donee as defined in Internal Revenue Code Section 170(c)(1) for purposes of both corporate and individual donors.
Charitable Donee Status

But that wasn’t enough. We felt we also needed a charitable organization as a second facet of the campaign.
With the assistance of Mrs. Susan Turner, we established C.A.R.E., Inc., a 501c3 corporation allowing us to accept donations from charitable organizations whose by-laws require that donations be made to such entities. We maintain the corporation and currently have approximately $4,000 in its account.
<table>
<thead>
<tr>
<th>Description</th>
<th>Deposits</th>
<th>Expenses</th>
<th>Earnings</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning Balance</td>
<td>$30,000.00</td>
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<td></td>
<td>$30,000.00</td>
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<tr>
<td>IRS (Establish 501c3)</td>
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<td>$500.00</td>
<td></td>
<td>$29,500.00</td>
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<tr>
<td>Transfer to CARE Fund</td>
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<td>$25,500.00</td>
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<td>$4,000.00</td>
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<tr>
<td>Interest 2001</td>
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<td>$33.60</td>
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<tr>
<td>Secretary of State</td>
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<td>Interest 2003</td>
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<td>Interest 2004</td>
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<td>$7.79</td>
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<tr>
<td>Totals</td>
<td>$30,000.00</td>
<td>$26,012.00</td>
<td>$64.25</td>
<td>$4,052.25</td>
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</table>
Recognitions

Campaign recognitions include:
• Car Tag for donating
Recognitions

Campaign recognitions include:

- Car Tag for donating
- Inclusion on “Giving Tree
Recognitions

Campaign recognitions include:

• Car Tag for donating
• Inclusion on “Giving Tree
• Recognition for “Top 20” Donors
Results

• $916,082 from 326 separate donors

• Average donation: $2,819

• Mean donation: $1,000
Where did we go from there?

Revenue:

The Board approved a bond program so that we could have immediate access to the funds while the pledges were being collected.

Funds were placed in a high yield interest-bearing account while bids were sought and projects started.
Total C.A.R.E. Income as of July 1, 2004

$1,164,253

CARE 2000 - 2004 Revenue

<table>
<thead>
<tr>
<th>Revenue Source</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proceeds of Bond Sale</td>
<td>$133,764</td>
</tr>
<tr>
<td>Interest</td>
<td>$116,628</td>
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<tr>
<td>Donations</td>
<td>$913,861</td>
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</tbody>
</table>

$133,764
$116,628
$913,861
Where are we today?

Expenditures:

Major projects completed and others on-going:
Total C.A.R.E. Expenditures as of July 1, 2004

$791,076

CARE Expenditures 2000-2004

- Contingency $373,178
- Roof $147,985
- Fire Alarm $35,192
- Lockers $12,232
- Sprinklers $344,464
- Misc. Building Repairs $30,489
- HVAC $104,588
- Supplies and Materials $5,839
- Windows $110,287

Total C.A.R.E. Expenditures as of July 1, 2004 $791,076
Roof in Need of Repairs
Roof Repairs - $147,985
Unreliable Fire Alarm
Upgraded Fire Alarm - $35,193
Windows in Need of Replacement
Window Replacement - $110,287
Middle School Lockers in Need of Replacement
New Lockers - $12,232
No Sprinkler System in Original Building
Sprinkler System - $344,464
Heating/Air-Conditioning Failing
Heating/Air-Conditioning -
$104,588
Miscellaneous Building Projects

• Flooding Problems in two rooms – one of the 6th Grade Classrooms & the ECE Office
• Fence Along East Boundary
• New Tile Floor in Cafeteria
• Replace steps at school entry
Miscellaneous Facility Projects: $30,489
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Funds for On-Going Projects as of July 1, 2004

$373,178

Contingency 2004 - 2008

- HVAC $120,000
- Roof $140,000
- Misc. Building Repairs $75,228
- Fire Alarm $10,000
- Windows $5,000
- Sprinklers $34,200
- Lockers $0
The legacy of the CARE Campaign and all those involved as leaders and donors is a more secure Anchorage School to serve future generations as it has those in the past!