



A CAMPAIGN FOR REGIS ST. MARY CATHOLIC SCHOOL



**BUILDING
OUR FUTURE**

REGIS ST. MARY FOUNDATION

*Photo credit:
Charlene Vogel Photography*

CAMPAIGN
case statement

A Message from the General Chairs

Dear Regis St. Mary Supporters,

Since Spring 2019, school leaders have joined with the directors of the Regis St. Mary Foundation to collaborate on the preparation and planning of this generation's most important capital campaign for Regis St. Mary Catholic School.

We are united in the launching of *Building Our Future* Capital Campaign. Our hope is that the greater Regis St. Mary family will share our vision to fund PK-12 educational programs, make critical updates to infrastructure, and build a larger endowment to ensure a sustainable future. We are seeking support from all constituents and will gratefully celebrate all gifts, large and small, that help us reach our goals.

We also request that our entire community pray for the success of this effort. Pray for guidance from the Holy Spirit and for the courage to follow the Lord's plan for us.

With knowledge, hard work, and prayer – we are confident that our campaign will succeed!

Yours in Christ,

Candi Hedrick
Principal

Amy Vetter
School Board President

Troy Gaul
Foundation President

Juli Bochsler
Past Parent and Grandparent





A STRATEGIC PLAN FOR SUCCESS

The worldwide COVID-19 pandemic is teaching our society to care for each other more so than any other single event in our lifetimes. At the same time, it has disrupted our lives and communities like no other and challenged us to respond to adversity as we pivot to what is becoming a new normal.

Clearly, the entire Regis St. Mary Catholic School community has felt the impact from complete closure of facilities last spring. We have gone without teaching in the classrooms. Sports and performing arts shut down. New teaching and learning strategies were implemented. Even the *Building Our Future* Capital Campaign went from the preparation phase to a temporary suspension.

After a four-month postponement, leadership has decided that it is in the best interest of the school, both short-term and long-term, to re-launch the campaign. Our needs are too great not to act now.

We believe the case for your support is strong. What we do now will position Regis St. Mary for immediate success as well as long-term sustainability. We need to:

- Replace aging infrastructure that cannot be further delayed;
- Add support for our educational programs;
- Secure funding for added tuition assistance.

For this effort to succeed, we need the help of many. We need support at all giving levels. We are appealing to current and past families, alumni, grandparents, businesses, foundations, and friends throughout the local Catholic community. Like benefactors of the past, we ask that you join us and make a commitment commensurate with the importance of this campaign. Our hope is that we will exceed our goals if our community responds with a sacrificial commitment over a three-year pledge period.

“The entire faculty and staff are so proud of the Class of 2020. Their tremendous discipline and creativity resulted in one hundred percent of them being accepted by the college of their choice. Congratulations!”

**Candi Hedrick, principal,
campaign co-chair**



ENROLLMENTS BY CAMPUS
Regis, grades 9-12 = 103
St. Mary PK-8 = 234

The average class size is 25 students
(20 students for Pre-School).



**96% of our
students are Catholic.**

Facts and Figures

History

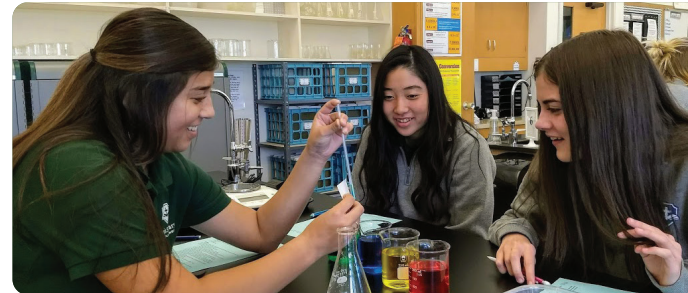
Regis St. Mary Catholic School is the leader of PK-12 Catholic education in rural Willamette Valley. This legacy dates to our founders whose dedication and hard work established the parish elementary school in 1929 and the high school in 1963. They merged in 2016 with one administration and one governing board. Grounded in the Catholic faith, the education offered has created multiple generations of engaged citizens who are contributing to their communities and to many corners of the world. Families choose our schools because they know that their children are in a safe and Christ-centered environment. For generations, Regis St. Mary's dedicated supporters have ensured tradition of excellence by strengthening existing programs, providing facilities for success, attracting and retaining top faculty, and preparing our graduates for careers and continuing education. We believe in our school leaders and faculty. They are changing the lives of students well beyond what is found in the traditional classroom. We take pride in our academic strengths, including the reinstatement of college-credit coursework offered on campus. Offered at no additional cost to students, these courses can save families more than \$5,000 in future college tuition.

We have a single source for funding our vision – your charitable support. Unlike public schools, we cannot count a special bond levy to support these vital needs.



“A Regis St. Mary education is a great value. Unlike most private schools, no extra fees are charged for Chromebooks or activities, including athletics. And with college credit courses offered at no cost, families can save at least \$5,000 in future college tuition.”

Amy Vetter, campaign co-chair



RSM FOUNDATION PROVIDES PRE-CAMPAIGN BOOST

When the COVID-19 pandemic interrupted the launch of this campaign in Spring 2020, the school was faced with delays of funding of some of its most urgent needs. The Foundation responded with advance funding for those projects, borrowing nearly \$1 million from existing assets ahead of anticipated campaign receipts so the school could move forward with projects at the high school campus during the pandemic- and summer vacation-related downtime. Campus improvements completed or under construction include:

- Renovation of the decaying and unhealthy boys' and girls' locker rooms along with creation of a fitness center and team room;
- Installation of air conditioning units in all classrooms in the academic building.
- Updating of the 50-year-old restrooms and plumbing in the academic building;
- Installation of a new dual boiler system.

The Foundation will be repaid through future fulfillment of *Building our Future* Campaign pledges.

Additionally, enhancements of our STEAM (Science, Technology, Engineering, Arts, Math) program received a head start in Spring 2020 thanks to a foundation grant and a matching gift from a loyal family. At no cost to students, the school replaced all Chromebooks with new ones to satisfy the first of a three-year STEAM program goal. The timely upgrade allowed students with the necessary technology to successfully tackle the challenges of online learning. Additional funds are still needed to allow Regis St. Mary to provide innovative and creative student learning experiences through its STEAM programs. This initiative responds to a community need to increase the number of graduates pursuing STEM fields of study and employment.



Investing in the Future Today

CAPITAL CAMPAIGN GOAL: \$5,000,000



\$1.5 million for tuition assistance.



\$2 million for the highest priority capital projects that will enhance teaching and learning, health and safety, and facility upgrades.



\$1 million for additional capital projects.



Add at least **\$500,000** for the Foundation endowment.

TUITION ASSISTANCE OPENS DOORS FOR MANY

Tuition assistance makes it possible for families with financial need to attend Regis St. Mary and receive an education unmatched by others. We are proud of our student achievements including 100% of our class of 2020 being accepted by the college of their choice. Our goal is simple – no student shall be denied a Catholic education due to cost. While we are diligent about keeping our tuition as low as possible, two-thirds of our students receive tuition assistance.

CAPITAL PROJECTS IMPACT LEARNING, HEALTH AND SAFETY

The projects focus on three areas: teaching and learning, health and safety, and facility upgrades. We need to provide new classroom equipment so we can expand our STEAM offerings, we need to make health and safety upgrades, and our buildings and infrastructure are aging.

Highest Priority Projects

- STEAM expansion (RSM)
- Literacy programs (SM)
- Basic classroom furniture (RSM)
- HVAC/Boiler improvements (RSM)
- Ceiling upgrades (SM)
- Fitness center, team room and restroom upgrades (R)
- Restroom updates (SM)
- Student Center roof (R)
- Campus Irrigation (R)
- Building lighting (RSM)
- Bottle fill stations (SM)

Additional Projects

- Student lockers (SM)
- Gymnasium sound system (R)
- Flooring (RSM)
- Exterior siding and paint (RSM)
- Activities Van (RSM)
- Playground structures (SM)
- Bus Barn expansion (R)
- Annex expansion (SM)
- Bleacher upgrades (SM)
- Kitchen upgrades (SM)
- Exterior door upgrades (R)
- Interior door upgrades (SM)
- Building access control (R)
- Breezeway (SM)
- Grandstand cover (R)
- Parking lot paving (R)
- Roofing (RSM)

“This campaign must be successful because it will provide for many critical needs. It is time for each of us to step up like those before us to ensure a strong learning environment for the next generation.”

Troy Gaul,
campaign co-chair

Projects are listed not necessarily in order of anticipated funding or completion.

*R = Regis campus
SM = St. Mary campus
RSM = both campuses*





LEAVING A LEGACY FOR FUTURE STUDENTS

The Foundation seeks to provide a stronger sustainable funding source for the school by increasing its endowment. This will allow the Foundation to distribute more than the mandatory four percent annually for tuition assistance and programming support. For every \$1,000,000 added to the permanent endowment, the Foundation can distribute at least an additional \$40,000 per year to the school.

A larger annual distribution from a healthy endowment will free up money from the operating budget for other educational needs. With two out of three students receiving tuition assistance, the long-term availability of tuition assistance is crucial to make a Regis St. Mary education attainable for many of our students. Growing the endowment means that the Foundation will allow for more programming and special project needs. Increasing the endowment is essential to the future sustainability of Regis St. Mary.

While cash gifts to endowment help immensely, the fastest way to build endowment is through estate planning and deferred gifts. Endowment building relies on gifts of all sizes: in recent years, the Foundation has received multiple seven-figure bequests as well as many smaller distributions from estates. To leave a lasting legacy to support Regis St. Mary students' academic, social and spiritual growth, talk to your financial and legal advisors about updating your estate plans. The Legacy Society exists to recognize these valued contributors both living and posthumously.

INVESTING IN THE FUTURE

At Regis St. Mary, we pride ourselves in community, building strong relationships, and seeking inspiration from the Lord to face difficult situations with grace and wisdom. Please consider how you can make a difference in this historic campaign to strengthen our Catholic education for children today and tomorrow.

Please contact us with any questions about the projects, goals or details about making a gift. We embark on this campaign to ensure that Regis St. Mary can enhance existing programs and introduce new curricula that will provide our students with the knowledge, skills and tools to be tomorrow's leaders.

FREQUENTLY *Asked* QUESTIONS

Can I choose how my gift is used?

Yes, although most donors are likely to leave their gifts unrestricted, you may designate your gifts towards one of the goals. Unrestricted gifts are most important so we can provide immediate funding for our highest priority projects.

Can I pledge over time?

Our campaign offers a wide range of gift opportunities to participate at all levels. Because our needs are urgent, we encourage you to complete your pledge within three years.

Is my pledge legally binding? Will it be confidential?

A pledge to support the *Building our Future* Capital Campaign is not legally binding. Our hope is that you make a commitment that you consider to be meaningful. All pledges will be kept confidential, with only the people responsible for maintaining campaign records having access to your pledge details.

Who will be asked to support the *Building Our Future*?

Every constituent group – alumni, current parents, past parents, grandparents, faculty and staff, school leaders, foundations, and friends -- will be asked to consider a gift to the campaign.

Can trust and estate gifts be made to the campaign?

Yes. While our primary needs require immediate funding, if a donor offers a planned gift, we will accept all deferred gifts and apply them to the endowment-building portion of the campaign. Gifts from donor advised funds and private foundations are also welcome and will be applied to the capital projects.



MAKING A PLEDGE IS YOUR FIRST STEP

Pledges payable over three years allow donors to consider more substantial commitments than are possible with one-time cash gifts. Donors who pledge may determine payment schedules to meet their own charitable or tax needs. Otherwise, gifts can be made in annual, semi-annual, quarterly, or monthly installments.

Payments can be made by cash, check, credit card (Visa, MasterCard, Discover), electronic funds transfer (EFT), or gifts of securities.

The inside story on making a gift

ARE CAMPAIGN GIFTS TAX DEDUCTIBLE?

As a qualified 501(c)(3) non-profit organization, campaign gifts to Regis St. Mary Foundation are tax deductible. Donors with specific questions regarding tax deductibility should contact their professional tax advisors.

WHAT ARE SOME BENEFITS FOR MAKING A GIFT?

While cash gifts are deductible for those who qualify, some popular gift options for donors are:

- Gifts of highly appreciated securities (stock) may provide donors with additional tax savings by avoiding capital gains tax and qualifying for a charitable tax deduction.
- An individual age 70 ½ or older can transfer up to \$100,000 from their IRA to the campaign and satisfy the required minimum annual distribution – without paying any taxes on the withdrawal.

For 2020 only:

- The CARES Act allows for an additional ‘above the line’ deduction for charitable gifts made in cash of up to \$300 for donors not itemizing their 2020 taxes.
- For individual taxpayer who do itemize deductions, the CARES Act temporarily suspends the 60% charitable contribution deduction limit for qualified cash contributions.
- Required minimum distributions (RMDs) are waived for IRAs, only for 2020.

OTHER WAYS TO GIVE

TRUSTS AND WILLS

While deferred gifts like bequests do not provide immediate benefit to the project construction, these options provide strategic ways to make lifetime gifts and may lower estate taxes for family.

GIFTS OF VALUABLE REAL AND PERSONAL PROPERTY

Campaign leadership will consider donations of cars, artwork, jewelry and other collectibles. An unencumbered piece of real estate that is readily saleable can be a wonderful gift.

LIFE INSURANCE

Donors may offer accumulated cash in insurance policies as campaign support. A policy purchased in the name of the school with the campaign named as the beneficiary, is another option for consideration. It’s worth noting that premium payments are tax deductible by directing them through the foundation.

MATCHING GIFTS

If your company has a matching gift program, you may be able to enhance the impact of your gift by requesting a matching gift from your company and including it with your pledge card.

Note: This information is not legal advice. Please consult a qualified professional adviser for specific recommendations.



FULFILLING YOUR COMMITMENT

3-YEAR PLEDGE	ANNUALLY	QUARTERLY	MONTHLY
\$100,000	\$33,333	\$11,111	\$3,704
\$50,000	\$16,667	\$4,167	\$1,389
\$30,000	\$10,000	\$2,500	\$833
\$24,000	\$8,000	\$2,000	\$667
\$15,000	\$5,000	\$1,250	\$417
\$10,000	\$3,333	\$833	\$278
\$5,000	\$1,667	\$417	\$139
\$3,600	\$1,200	\$300	\$100
\$1,800	\$600	\$150	\$50
\$1,200	\$400	\$100	\$33

Campaign Leadership

CAMPAIGN CO-CHAIRS

Candi Hedrick
Principal

Troy Gaul
Foundation President

Amy Vetter
School Board President

Juli Bochsler
Past Parent and Grandparent

SPIRITUAL LEADERS

Fr. Paul Materu, ALCP
Fr. Luan Nguyen

HONORARY CHAIRS

Mike Bauer
Ralph[†] and Louise Bochsler
Ted Freres[†]
Bob Freres[†]
Steve McGrew
Monsignor Gregory Moys
Monsignor Tim Murphy
Norm Purvis[†]
Tom and Greta[†] VanVeen

[†]*Honored posthumously*

CAMPAIGN CABINET

Sarah Adams
Randy Bentz
Mary Booth
Larry Etzel
Todd Gescher
Craig Gries
Lynda Harrington
Sue Harteloo
Karen Hendricks
Austin Highberger
Katie Koenig
John Lorenz
Bill and Julie Lulay
Tom and Carolyn Lulay
John Meldrum
Adam Mumej
B.C. Nelson
Maria Schmidlkofer
George Smith
Travis Woods
Missy Vaughn

SPECIAL EVENTS COMMITTEE

Kris Bishop

CAMPAIGN OFFICE

Signe Woods
Foundation Executive Director

CAMPAIGN COUNSEL

Steier Group

“The young men and women who graduate from Regis today are the business and community leaders of tomorrow. Investing in their future makes a stronger future for all of us.”

Juli Bochsler
campaign co-chair

ACCREDITATION
Regis St. Mary operates under the auspices of the Archdiocese of Portland and is fully accredited by the Northwest Association of Accredited Schools, Western Association of Schools and Colleges (WASC), and the Western Catholic Educational Association (WCEA).

The Regis St. Mary Pre-School program is certified by the State of Oregon Child Care Division.



**BUILDING
OUR FUTURE**

REGIS ST. MARY FOUNDATION

Regis St. Mary Foundation
550 West Regis Street
Stayton, OR 97383
503-769-1705
www.regisstmary.org