



# St. Thomas the Apostle School

## Fundraising Policy

St. Thomas the Apostle School is grateful to have the support of current families, alumni, parishioners, and friends who want our students to have the best educational program possible. The Advancement team at St. Thomas the Apostle School is committed to making sure that our school gets the resources it needs most. In order to run the most efficient Advancement program possible, we ask that you please contact the school regarding any efforts connected to fundraising for St. Thomas the Apostle School.

- St. Thomas the Apostle School welcomes expressions of interest and financial support, solicited or unsolicited, regardless of size or form, from any individual, family, business, corporation, foundation or similar source.
- The Director of Advancement and the Principal are available to meet with any prospective donor(s) and their financial advisors, without obligation, to discuss areas of interest, the plans of St. Thomas the Apostle School, types of gift commitments, options for payment, etc. so as to provide every possible assistance to a prospective donor.
- Although representatives of St. Thomas the Apostle School will provide all appropriate assistance, the ultimate responsibility regarding asset evaluations, tax deductibility, and/or similar federal, state and/or local legal compliance rests with the donor(s).
- No volunteer or member of the faculty and staff acting in the name of St. Thomas the Apostle School will contact a prospective donor or solicit a gift or service without the expressed permission of the Director of Advancement and Principal.
- The Director of Advancement and the Principal will meet regularly to discuss solicitation and stewardship plans for major donors.
- Group solicitations require the approval of the Director of Advancement.
- Requests for mailing lists to alumni, parents or other donors require the approval of the Director of Advancement.
- All special events, outside of the normal schedule of school events, which raise funds for the benefit of St. Thomas the Apostle School require prior approval of the Director of Advancement.
- Solicited gifts to St. Thomas the Apostle School may take the form of one, or a combination, of the following:
  - Cash
  - Checks made payable to: "St. Thomas the Apostle School"
  - Matching gifts
  - Monthly and multi-year pledges
  - Marketable securities
  - Closely held stock and non-marketable securities
  - Real Estate and other Tangible Personal Property
  - Paid-in-full insurance policies with cash values

- Corporate Gifts
- Gifts-in-kind
- Gifts of Services
- Deferred or planned gifts including:
  - Trusts
  - Annuities
  - Insurance policies
  - Gifts of residence, with or without a retained life interest
  - Charitable remainder unitrust
  - Charitable remainder annuity trust
  - Bequests
- Gifts will be accepted by St. Thomas the Apostle School, provided they are considered consistent with St. Thomas the Apostle School's mission, goals, and objectives. All proposed gifts, gifts-in-kind (equipment, art objects, real estate, etc.) and restricted gifts will be reviewed by the Director of Advancement and the Principal.
  - A gift may be deemed unacceptable if it:
    - Is not conducive to the best interest of St. Thomas the Apostle School
    - Is in contravention of applicable Federal or State laws or school policies
    - Is clearly a commercial endeavor for the sole benefit of the donor
    - Presents an unreasonable or unacceptable degree of risk due to environmental or health/safety issues
    - Is hampered by restrictions to the extent that usefulness and desirability are affected
    - Would obligate St. Thomas the Apostle School to undertake responsibilities, financial or otherwise, which it feels are inappropriate or onerous
  - St. Thomas the Apostle School reserves the right to refuse such gifts or to counsel the donor to remove or modify the restrictions or terms and conditions of the gift.
- The Principal, the Director of Advancement or their designees may accept gifts on behalf of St. Thomas the Apostle School. Formal recognition of a received gift is completed with the presentation of a receipt or formal acknowledgement.