

A CAMPAIGN FOR WAHLERT CATHOLIC HIGH SCHOOL



Case Preview

SOARING

WAHLERT CATHOLIC HIGH SCHOOL
A HOLY FAMILY CATHOLIC SCHOOL

{our mission}

FORMING
DISCIPLES OF
JESUS CHRIST
THROUGH
CATHOLIC
EDUCATIONAL
EXCELLENCE.

{our message}

Dear friends,

In the fall of 1959, Wahlert Catholic High School opened its doors and soon gained a reputation for excellence that extended across the state of Iowa. Through solid formation in the Catholic faith, rigorous academics, successful co-curricular programming and an expectation for service, thousands of Wahlert graduates have been prepared to assume leadership roles in their parishes, communities and careers. As we continue to strive for excellence across the Holy Family Catholic Schools system, we know that both our proud past and promising future have been made possible by the faith and generosity of our many supporters.



While the education inside its walls remains strong, the building housing Wahlert Catholic is in desperate need of updates. As part of a long-range facilities planning process two years ago, the Holy Family Board of Education authorized the creation of an improvement plan for Wahlert Catholic to meet the current and future educational needs of our students. We are grateful to the many parents, alumni, parents of alumni, students, faculty and others who participated in this process. Their work identified a number of urgent items that need to be addressed to allow us to continue to provide the best possible learning environment, long-term financial stability and an attractive, modern school for generations to come.



This long-range planning and the positive findings of our campaign feasibility study have allowed us to develop a vision to fulfill our mission now and into the future. I urge your participation in this challenging and exciting endeavor.

I invite you to take your place among the families who have gone before us in support of Catholic education in our community. I look forward to your continued partnership in our mission. I am convinced that, through your prayers, encouragement and support, we are certain to succeed.

Thank you for your consideration.

Sincerely,

Carol Schmidt Trueg '79
Chief Administrator, Holy Family Catholic Schools



A graduate of the Holy Family Catholic Schools system will be a:

- Person of Faith
- Moral Decision Maker
- Critical Thinker
- Productive Worker
- Effective Communicator
- Creative Person

Thank you, supporting parishes:

- Church of the Nativity
- Church of the Resurrection
- Holy Family New Melleray
- Holy Spirit
- St. Anthony
- St. Catherine
- St. Columbkille
- St. Joseph Key West
- St. Joseph the Worker
- St. Patrick
- St. Raphael Cathedral

The success that we have experienced over the years is directly tied to our generous supporters and the parishes of our faith community that provide vital support for our schools. As we continue to work to provide our students with the best possible Catholic education, please know that we are grateful for the many ways that you make Holy Family Catholic Schools better.

Achieve

WE ARE INNOVATIVE By making technology a key player in our curriculum, we can deliver a more individualized learning experience and also facilitate creativity and problem-solving for a 21st century world.

WE ARE EFFECTIVE According to the ACT, our high school students are significantly better prepared for college than their state or national peers. We graduate 100 percent of our students, and on average, 96 percent pursue a college education—at some of the finest institutions in the state and nation.

WE ARE CHALLENGING Our growing curriculum, designation as a top Advanced Placement school in Iowa, and opportunities for courses offering both high school and college credit are all testaments to our dedication to challenging our students.

WE ARE PROGRESSIVE Our students are developing college-level skills in numerous programs such as Project Lead the Way's Biomedical Sciences and Pathways to Engineering, FIRST Tech Challenge, Chinese language and others to prepare them for a future in the global marketplace.



2014-2015 ENROLLMENT

Wahlert Catholic High School	523
Mazzuchelli Catholic Middle School.....	391
Holy Ghost Elementary School	81
Resurrection Elementary School.....	225
St. Anthony Elementary School.....	98
Our Lady of Guadalupe Spanish Immersion Program.....	151
St. Columbkille Elementary School.....	251
TOTAL	1,720

2014-2015 STAFF

Administrators.....	9
Food Service	46
Maintenance	17
Support Staff	38
Teachers	141
Teacher Aides.....	26
Early Childhood Associates	114
TOTAL	391

A LOOK AT TUITION

Elementary	\$2,675
Middle School.....	\$3,065
High School	\$5,600



prepare them for a lifetime of success

Lead

While the academic reputation of Wahlert Catholic High School has remained strong for the last 55 years, the building's infrastructure and core academic areas are much the same as they were in 1959. The full review of the existing building identified key areas of need that must be addressed:



- Current exterior siding is both unattractive and ineffective
- Roofs are aging and some need immediate replacement
- All but two of the electrical distribution panels are original equipment and electrical service needs to be replaced
- Lighting fixtures in the classrooms have less than ideal distribution of light and contribute to a poor appearance and inefficiency
- Existing emergency lighting does not meet current code
- Lighting controls do not exist
- Mechanical steam boilers are original equipment
- Original steam unit ventilators in the classroom have air intakes blocked
- Many areas have not been air conditioned
- Fire sprinklers are not present
- Plumbing lines are original and in need of replacement
- Choir and band sound separation is inadequate
- Travel to the upper floor of the west wing and lower level is inefficient
- The lower level is dark and dingy
- Plywood framing and shelving for storage creates potential hazards throughout the building
- Theatre storage is inadequate
- Lack of an adequate and convenient freezer and appliances in the kitchen affects food preparation

Although the facilities have served us well over the years, the time has come to complete a comprehensive renovation the Wahlert Catholic High School. The *SOARING* Capital Campaign will complete our vision for the future by improving the overall learning environment, our long-term financial stability and the appearance and functionality of the campus that promotes our Catholic Identity.

OUR VISION TO IMPROVE THE OVERALL LEARNING ENVIRONMENT WILL:

- Utilize natural lighting, improve air quality and acoustics
 - Plans call for adding glass to interior and exterior walls to improve natural lighting
- Air condition the entire facility
- Enhance the fine arts areas with soundproofing

OUR VISION TO IMPROVE THE LONG-TERM FINANCIAL STABILITY WILL:

- Advance the goal of building enrollment
- Replace outdated mechanical, electrical and plumbing to be more energy efficient and reduce operation costs for utilities, maintenance and food service with an updated kitchen
 - Boilers that currently heat the building are original equipment, so plans call for a new mechanical system for heating and air conditioning

OUR VISION TO IMPROVE THE OVERALL APPEARANCE AND FUNCTIONALITY OF THE CAMPUS WILL:

- Create an attractive physical building that is pleasing to look at and equal to our community peers to boost enrollment
 - Plans call for replacing the exterior siding with block and brick to give the school a pleasing, modern look and increase energy efficiency. The roof is also in need of repair and replacement
 - Plans call for numerous improvements to the classrooms and performing arts areas by upgrading science labs, improving sound isolation between choir and band areas, and painting and modernizing the classrooms
- Address safety and hazardous materials issues throughout the facility
 - Plans call for upgrading interior electrical service, modernizing restrooms, adding fire sprinklers and removing hazardous materials as necessary
- Improve traffic flow and accessibility to all parts of the building
 - Plans call for a three-story central staircase to improve access to all levels on the east and west wings of the school



{our goals}





Soar

The SOARING Capital Campaign will address as many needs as possible during the five-year pledge period by focusing on the urgent facility improvements at Wahlert Catholic High School.

Holy Family's leadership has adopted a phased approach in structuring our campaign goals. Our goals include vital elements to meet our educational and infrastructure needs, and, with your investment in Holy Family's mission, we are sure to celebrate reaching these important milestones together.

CELEBRATION GOAL: \$10 MILLION TOTAL

Reaching the Celebration Goal will:

- Resurface the building's siding with brick and block and begin roof repair
- Upgrade the heating system
- Upgrade interior electrical service, add fire sprinklers, modernize plumbing and remove hazardous materials

CHALLENGE GOAL: \$14 MILLION TOTAL

An additional \$4 million will achieve the Challenge Goal to:

- Resurface the building's siding with brick and block and continue roof repair
- Upgrade the heating system and **add air conditioning**
- Upgrade interior electrical service, add fire sprinklers, modernize plumbing and remove hazardous materials
- **Provide limited renovations to chapel, classrooms, science labs, restrooms and kitchen**



TRANSFORMATIONAL GOAL: \$17 MILLION TOTAL

An additional \$3 million will achieve the Transformational Goal to:

- Resurface the building's siding with brick and block and **complete roof repair and replacement**
- Upgrade the heating system and add air conditioning
- Upgrade interior electrical service, add fire sprinklers, modernize plumbing and remove hazardous materials
- **Complete full-scale renovations to chapel, classrooms, science labs, restrooms and kitchen and improve natural lighting**
- **Add three-story central staircase**

As additional funds are secured, additional educational needs will be addressed. Further needs include:

- Scholarship Endowment
- Tuition Assistance Endowment



{our goals}

{ways to give}

Selecting the best gift plan depends on one's personal financial situation and goals. As tax laws are always changing and each individual's situation is unique, donors are encouraged to consult with financial advisors to determine which method of contributing is most beneficial to them.

There are many ways of giving so that you are able to meet your needs and have the opportunity to support Holy Family Catholic Schools in a meaningful way. Pledges are commitments made in good faith, but are not legally binding. Donors may want to consider stretching pledges over a five-year period to maximize the total amount of your support. This commitment can be fulfilled through monthly, quarterly, semiannual or annual installments.

WE ENCOURAGE ALL DONORS TO CONSIDER A 10-20 PERCENT INITIAL PAYMENT TO BEGIN YOUR COMMITMENT.

GIFTS MADE BY CASH OR CHECK are the most common and will allow Holy Family Catholic Schools to address its immediate needs. Checks should be made payable to Holy Family Catholic Schools. However, while the needs of the capital campaign are urgent, we will gratefully accept gifts in various forms, including the following:

GIFTS OF SECURITIES – STOCKS, BONDS AND MUTUAL FUNDS Charitable gifts of stocks, bonds or mutual funds that have been held for at least one year and have appreciated offer special tax advantages. You will receive a tax deduction for the full market value of the gift but you will not have to pay capital gains tax on the appreciated amount. If you sell depreciated stock and contribute the proceeds, you will receive both a tax deduction for the charitable gift and a deduction for the capital loss.

GIFTS OF REAL ESTATE Donations of appreciated homes, and other real property, are entitled to an income tax deduction equal to the full value of the property and no tax on the capital gain. If debt-free property is donated, the gift is deductible at the property's appraised value. It may even be possible to make your gift of property now, but still maintain the right to use the property. By making this gift now, rather than in your will, you can realize an immediate income tax deduction.

PLANNED GIFTS Planned giving is the process of carefully selecting the best method and asset for making a charitable gift. A deferred gift through an estate plan or life income gift offers you the ability to support Holy Family Catholic Schools but retain the income from those assets during your lifetime. Such a gift can enable you to take full advantage of the tax laws to accomplish your financial and charitable goals. Planned gifts can be made through:

- Bequests by will or living trust
- Charitable Lead or Remainder Trusts
- Charitable Gift Annuities
- Beneficiary benefits from IRAs, pensions, or financial accounts

LIFE INSURANCE Holy Family Catholic Schools can be named as primary or contingent beneficiary of a life insurance policy. Life insurance gifts are simple; just ask the insurance company for the appropriate forms to make the Holy Family Catholic Schools the owner or beneficiary of a policy. Gifts of a policy are tax deductible, as are future premium payments.

The Holy Family Advancement Office or your tax advisor can provide more information about these options.





COMMEMORATIVE OPPORTUNITIES

Think back to the people who have transformed your life and made you who you are today. A truly gratifying experience is giving a gift in honor or in memory of someone important – someone who has influenced your life. The *SOARING* Capital Campaign will have multiple opportunities to create lasting tributes to family and friends. Please contact the Holy Family Catholic Schools Advancement Office to discuss the available opportunities.

→ *{Budgeting your gift over five years}*

TOTAL GIFT	INITIAL 10% INVESTMENT	DAILY	WEEKLY	MONTHLY	QUARTERLY	SEMI-ANNUAL	ANNUAL
\$250,000	\$25,000	\$123	\$865	\$3,750	\$11,250	\$22,500	\$45,000
\$150,000	\$15,000	\$74	\$519	\$2,250	\$6,750	\$13,500	\$27,000
\$100,000	\$10,000	\$49	\$346	\$1,500	\$4,500	\$9,000	\$18,000
\$75,000	\$7,500	\$37	\$260	\$1,125	\$3,375	\$6,750	\$13,500
\$50,000	\$5,000	\$25	\$173	\$750	\$2,250	\$4,500	\$9,000
\$25,000	\$2,500	\$12	\$87	\$375	\$1,125	\$2,250	\$4,500
\$20,000	\$2,000	\$10	\$69	\$300	\$900	\$1,800	\$3,600
\$15,000	\$1,500	\$7.40	\$52	\$225	\$675	\$1,350	\$2,700
\$10,000	\$1,000	\$4.93	\$35	\$150	\$450	\$900	\$1,800
\$7,500	\$750	\$3.70	\$26	\$113	\$338	\$675	\$1,350
\$5,000	\$500	\$2.47	\$17	\$75	\$225	\$450	\$900
\$3,000	\$300	\$1.48	\$10	\$45	\$135	\$270	\$540
\$2,500	\$250	\$1.23	\$9	\$38	\$113	\$225	\$450
\$1,500	\$150	\$0.74	\$5	\$23	\$68	\$135	\$270

{Campaign Leadership}

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DEVELOPMENT COUNSEL

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