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THANK YOU FOR YOUR GENEROSITY.



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WALDORF SCHOOL OF ORANGE COUNTY ANNUAL GIVING



*"A healthy social life is found only, when in the mirror of each soul
the whole community finds its reflection, and when in the
whole community the virtue of each one is living."*

~Rudolf Steiner

25 YEARS STRONG

As we celebrate our 25th year, we cannot help but express our gratitude to all those who came before us. 25 years ago a group of brilliant and dedicated people found commonality in bringing a Waldorf School to Orange County. Little did they know that a mere quarter century later, what started in a church basement would now be the thriving Playgroup through Grade 12 program all our children enjoy today.

Perhaps Margaret Mead said it best, *“Never doubt that a group of thoughtful committed citizens can change the world; indeed, it’s the only thing that ever has.”*



Our heartfelt thanks go to those pioneers for all they gave, as we plant our own seeds in 2013. Seeds of fortitude, vitality, and longevity so the rich educational program experienced by our own children today may continue with even greater strength, far into the next 25 years. We hope to see you all back here in 2038 to celebrate WSOC’s 50th birthday. Just as our forefathers are in amazement at what exists now, we cannot possibly fathom what greatness lies ahead.

We are also looking forward to the wonderful educational opportunities from which all our children will benefit this year. With this in mind, we are sharing a budget overview with you as background into this year’s request for your support of Annual Giving. This fund is fueled by people just like you who care about the school and its ability to deliver a vibrant and complete Waldorf education to our students.

FREQUENTLY ASKED QUESTIONS

Do corporations and foundations support Annual Giving?

Corporations typically contribute to independent schools by offering matching gifts to their employees’ contributions. Many WSOC families are able to double their personal contributions through such employee match programs. Check with your employer to see if they have a matching policy.



Foundations generally give to Annual Giving appeals when there is a direct personal connection to the organization. Usually they are more interested in specific projects that are within their funding guidelines and advance their specific area of interest.

Can I donate stock to Annual Giving?

Yes. This is a great way to make a gift to the school. Giving appreciated securities provides you with a tax deduction for the appreciated value of the stock without incurring capital gains tax. Please contact Kim Sava, Business Manager, at (949)574-7775 for the details.



FREQUENTLY ASKED QUESTIONS

Who supports Annual Giving?

Every segment of the school community! The Board of Trustees, faculty, staff, parents, grandparents, alumni parents, alumni, and friends. In past years we have had enrolled family participation rates as high as 90%. We strive for 100% participation as a testament to our community's dedication and indication of how much they value this education for their children.



Why is participation important?

The school's financial strength is dependent upon the participation of all members of its constituency. Your participation generates enthusiasm and encourages others to join you. It is also a key indicator to foundation and corporate donors that we have consistent support from those we serve, both past and present.

How much should I give?

Participation with gifts of all sizes is needed. The average gift at WSOC is \$500. Some families truly cannot afford to give that much, yet others in the community are blessed with the means to contribute more. We ask each family to look into their heart and give to their family's best ability.



THE IMPORTANCE OF PARTICIPATION

Each year the community comprised of teachers, parents, staff, alumni, grandparents, board members, friends, and family unite to contribute to the school's fiscal well-being.

Your generosity goes directly toward the day-to-day operations of the school, allowing us to provide a comprehensive educational program including: cultural and foreign language study, performing arts, applied arts, music, and movement, all in conjunction with



a strong academic curriculum of mathematics, language arts, and science.

Because tuition alone does not fully cover the cost of providing such extraordinary programs, it is vital that each year, 100% of our community participates in Annual

Giving in a way that is meaningful to their family.

One additional and very important aspect of Annual Giving participation is that it is how we demonstrate our high level of commitment to the world of philanthropists and foundations. When 100% of the people who benefit from our organization most, also care enough to donate, this sends a strong message and helps us to obtain outside grants and gifts.



On behalf of all our students and teachers, thank you for your support.

2013-2014 WSOC BUDGET OVERVIEW

The school's budget for the 2013-2014 academic year has been set against a backdrop of the following strategic goals:

- Maintaining a balanced budget.
- Investing in the continued growth of the school.
- Improving the process around our Tuition Assistance program.
- Retaining and attracting excellent faculty and staff.

The school has established an operating reserve of approximately \$600,000. This is a good start toward the goal of establishing reserves at a healthy level. We are moving in a positive direction as we were able to contribute to reserves in 2012-2013 and have budgeted to do so again in 2013-2014.

Enrollment continues to grow in all programs and, through the generosity of donors in our community, we were able to build a new home for our Playgroup, WSOC's program for the youngest members of our community, which has now expanded to five days per week.

The school is also very proud of its Tuition Adjustment Program, as it is a critical social and economic component to the overall well-being of WSOC.

The Tuition Adjustment Program at WSOC fulfills these goals:

- It makes a Waldorf education possible for families who value it highly, regardless of their ability to pay the full tuition.
- It supports cultural and economic diversity, in alignment with the social mission of Waldorf Education.
- It is a stabilizing economic force for the school.

FREQUENTLY ASKED QUESTIONS

Why is Annual Giving Necessary?

Tuition income covers 89% of our operating expenses. The remaining 11% is raised through our Giving Program: Annual Giving, Scrip, Company of Angels, and special events such as the Gala, Golf Tournament, and student Move-a-Thon.

Each of our attending families is asked to make a donation to Annual Giving in addition to paying tuition, in order to help close this gap.



Why not just raise tuition?

As a private, non-denominational school, WSOC is among the lowest tuition rates in Orange County. We aim to keep tuition accessible and affordable to continue to attract and retain a diverse student body. Remember, tuition is a non-tax-deductible contracted contribution to the school, whereas gifts to the Annual Giving Fund are fully tax-deductible.

What makes WSOC an independent school?

We design our own program and curriculum, operate without financial support from federal or state government agencies, and are self-governed by our Board of Trustees and College of Teachers. Unlike public schools, which are funded by tax dollars, independent schools rely solely upon tuition revenues and philanthropic gifts to meet their operating and capital expenses.



FREQUENTLY ASKED QUESTIONS

What is Annual Giving?

It is a direct appeal to trustees, parents, grandparents, alumni parents, alumni, faculty, staff, and friends for financial contributions in support of the school's day-to-day operating budget. It is a way to sustain the highest functionality of the school while keeping tuition increases as minimal as possible. Tuition is not tax-deductible, but gifts to Annual Giving are.



What are the major components of the school's operating budget?

The majority (72.6%) of the operating budget is spent on salaries and benefits. The remaining 23.4% is for facilities, program expenses, and general operating costs. The Board of Trustees strives to run the school in a fiscally-responsible manner without compromising the integrity of the program. This year we have budgeted \$3.8 million in operating expenses.



2013-2014 WSOC BUDGET OVERVIEW

While the number of families participating in our TA program has stabilized, overall enrollment at the school has increased.

In conclusion, the Board of Trustees is pleased with an anticipated cash operating budget surplus of \$110,000 for the 2013-2014 year. This will be obtained, in part, through support from our community of Annual Giving and other fundraising events held during the year. We have seen over the past two years that the requirement to draw from our reserves has diminished; however, your support remains of high importance. This year's budget includes improvements to the campus, such as a new 3rd grade garden, the strengthening of our Strings Program, and added administrative support staff.

We appreciate your unwavering support for our school and look forward to full participation in the Annual Giving Campaign this year.

Sincerely,

The WSOC Finance Committee

David Burnett, Chair, Board of Trustees

Carol Sudbeck, Treasurer, Board of Trustees

Kim Sava, Business Manager

Lisa Masterson, College of Teachers

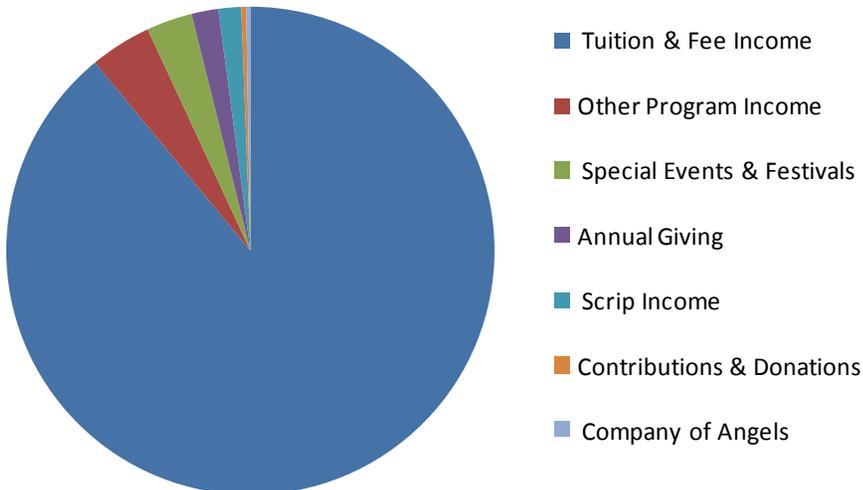
Joe DeMichele, Board of Trustees

2013-2014 WSOC BUDGET OVERVIEW

Revenue

Tuition & Fee Income	\$3,509,785	89%
Other Program Income	\$160,709	4.1%
Special Events & Festivals	\$119,825	3.0%
Annual Giving	\$70,000	1.8%
Scrip Profits	\$59,300	1.5%
Contributions & Donations	\$12,500	0.3%
Company of Angels	\$11,000	0.3%
Total Revenue	\$3,943,119	100%

REVENUE



2013-2014 WSOC BUDGET OVERVIEW

Expenses

Salaries, Benefits & Taxes	\$2,784,271	72.6%
Facilities	\$349,413	9.1%
General School & Office	\$327,997	8.5%
Other Expenses	\$234,530	6.1%
Financial, Legal & Insurance	\$140,224	3.7%
Total Expenses	\$3,836,435	100%

EXPENSES

