It is education which is progressing continually in order to keep in step with the constant changes occurring in the world around us. It’s a changing education for a changing civilization.

— Eva Edwards Lovett, school founder
In its development along the lines of Progressive Education—as our underlying principles and practices are described—the school has had the loyal, sympathetic, and active cooperation and support of a highly intelligent group of parents.

— Eva Edwards Lovett

The Lovett School could not exist without the support of the Lovett family—from our parents to an extensive network of alumni, grandparents, trustees, parents of alumni, faculty/staff, and other friends and volunteers.

The community’s commitment to Lovett is uplifting and inspiring, and allows the school to carry out its mission of offering a progressive education grounded in lifelong learning, moral character, and community engagement.

At The Lovett School, we have been the beneficiary of such philanthropy for close to 90 years. Generations of Atlanta families have invested in the future of our school to ensure the very best education for our students. A newly renovated campus, well-equipped classrooms, increased tuition assistance, and more professional development opportunities for faculty and staff are all examples of Lovett philanthropy at work.
“Corporations, foundations, and other friends of the school look first at the voluntary financial support provided by those closest to Lovett before deciding the level at which they will support our school.”
TIME AND TREASURE

Support to Lovett comes in two main ways: gifts of time and gifts of treasure.

Time
Volunteering one’s time at Lovett can take many forms:

• Staffing the concession stand at a football game
• Serving as a room parent or on a committee
• Making calls for the True Blue Annual Fund
• Baking cakes for faculty/staff birthdays
• Volunteering in the Lower School Library
• Preparing a post-performance reception for Fine Arts
• Volunteering at the International Book Fair

Whatever your talent or passion, and whatever your available time commitment, The Lovett School appreciates—and depends on—your help.

Treasure
Like most independent schools, tuition and fees do not cover the total cost of educating your student, and so additional financial support from all members of the Lovett community is key. And, as is the case with other independent schools, Lovett solicits tax-deductible gifts and special financial support from its constituencies in these ways:

• The True Blue Annual Fund
• Capital Campaigns
  — to support facilities and the endowment
• Special Interest Gifts
  — to include restricted gifts, membership in and gifts to parent organizations, gifts in support of Breakthrough Atlanta, and fundraising events
• Legacy Gifts

The amount each family and individual gives is a personal decision. We hope that all members of the Lovett community will participate to the best of their ability. Corporations, foundations, and other friends of the school look first at the voluntary financial support provided by those closest to Lovett before deciding the level at which they will support our school. A high participation rate from Lovett’s family is critical. Every gift makes a difference, no matter the amount.
“Tuition only covers 80 percent of our school’s annual operating budget, so Lovett relies on gifts to the True Blue Annual Fund to raise a portion of the additional 20 percent.”
Support of the True Blue Annual Fund demonstrates the loyalty, commitment, and generous spirit of our Lovett community. To honor the interests of our donors, we have created the True Blue Family of Funds. Through these funds, True Blue donors may choose to direct their annual giving donation to a particular area of the school’s operations that they find most meaningful.

• Area of Greatest Need
• Athletics
• Faculty Professional Development
• Fine Arts
• Financial Assistance
• Global and Community Engagement
• Sustainability
• Technology and Innovation

The True Blue Family of Funds supports our students and faculty through the school’s operating budget. Should designated contributions exceed a fund’s budgeted limit, the school directs the funds to the area of greatest need.

All families are asked to support the True Blue Annual Fund and will receive an initial request each fall. True Blue gifts are tax-deductible as allowed by law. The True Blue Annual Fund starts on July 1 and payments are due by June 30 the following year.

Visit www.lovett.org/trueblue to learn more.

“Lovett fosters a sense of community, builds values, and enhances character, enriching our students’ lives and maximizing their potential. Our family is honored to contribute to Lovett’s vision by supporting the True Blue Annual Fund.”

— Karen and Charles Andros, Lovett parents
Many employers will match charitable contributions made by their employees. Your gift to Lovett may be doubled or possibly tripled!
True Blue Annual Fund FAQs

Why can't Lovett increase tuition to cover the full cost of educating each student?

Large increases in tuition may prohibit the opportunity of a Lovett education to many families, therefore altering the diverse culture and distinctive learning environment each student currently enjoys. Through tax-deductible donations to the True Blue Annual Fund, we can keep tuition costs more affordable and provide financial aid and scholarships to deserving students.

How does a gift to True Blue differ from gifts for major facilities and the endowment?

Periodic appeals are made for specific needs, such as facility improvements or increases to endowment. These appeals are typical during a capital campaign. A facility or endowment gift will go towards Lovett's capital assets. The True Blue Annual Fund is used for current operations.

I redirected my Georgia tax liability to Lovett through the Georgia Private School Tax Credit Program. Can that count as my True Blue gift?

No. While we appreciate you redirecting your state tax dollars for financial aid at Lovett, please note that a contribution to the Apogee Student Scholarship Organization, designated to Lovett, cannot be counted as a gift to the True Blue Annual Fund or as a campaign gift.

What is a matching gift?

Many employers will match any charitable contributions made by their employees. If your company has such a program, request a matching gift form. Your gift to Lovett may be doubled or possibly tripled! Some companies even match gifts made by retirees and/or spouses. To find out if your company has a matching gift policy, please visit www.matchinggifts.com/lovett.

How to Donate or Pledge to the Annual Fund

Online
www.lovett.org/give;
VISA, MasterCard, or American Express are accepted

Check
The Lovett School,
Attn: The Annual Fund
Advancement Office
4075 Paces Ferry Road, N.W.
Atlanta, GA 30327-3009

Stock
Contact April Perez at april.perez@lovett.org or (404) 262-3032, ext. 1229

More Information
Contact Kathleen Bryant, Associate Director of Development for Annual Giving, at kathleen.bryant@lovett.org or (404) 262-3032, ext. 1240
# Independent School Fundraising at a Glance

<table>
<thead>
<tr>
<th>What It Is</th>
<th>Frequency</th>
<th>What It Does</th>
<th>What It Funds</th>
<th>Real Life Equivalent</th>
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<tbody>
<tr>
<td><strong>True Blue Annual Fund</strong></td>
<td>Every year</td>
<td>Supplements annual expenses not covered by tuition</td>
<td>Anything normally paid by the operating budget, including educational technology, classroom supplies, and curricular activities</td>
<td>A checking account</td>
</tr>
<tr>
<td><strong>Building Funds</strong></td>
<td>Periodically</td>
<td>Funds buildings and renovations not covered by tuition</td>
<td>Bricks-and-mortar projects</td>
<td>Putting an addition on a home you already own</td>
</tr>
<tr>
<td><strong>Endowment</strong></td>
<td>Periodically</td>
<td>Takes the pressure off the operating budget and tuition</td>
<td>Salaries and benefits, faculty development, enrichment programs, and financial aid</td>
<td>An investment account that produces dividends or interest</td>
</tr>
<tr>
<td><strong>Special Interest Giving</strong></td>
<td>As donor feels moved to participate</td>
<td>Funds special unbudgeted items and programs</td>
<td>Surprise needs in specific areas of school life</td>
<td>A gift for something you could not otherwise afford</td>
</tr>
<tr>
<td><strong>Legacy Gifts</strong></td>
<td>Once in a lifetime</td>
<td>Helps ensure Lovett’s financial future</td>
<td>Endowment or donor’s choice</td>
<td>Retirement plan</td>
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</table>
CAPITAL CAMPAIGNS
LOVETT’S SECOND GIVING PRIORITY

Periodic capital campaigns are held for specific needs, such as growing the endowment or facility improvements.

**Endowment**

The Lovett School Endowment Fund is a collection of funds (unrestricted and restricted) that supports students, faculty, staff, and programs. Each year about 6 percent ($2.95 million in 2012–13) of operations are funded by endowment, making it one of the school’s three main sources of income, along with tuition (80 percent) and annual giving (5 percent).

A strong endowment helps an institution sustain its vision, offers it flexibility during tough economic times, and provides it a perpetual financial fabric.

"Being recognized for modeling the very ideals that I so deeply cherish, especially among such a distinguished group of faculty and administrators, is nearly impossible for me to fully comprehend. I am honored beyond words.

— Stutz Wimmer, Upper School Band Director and Wood Family Distinguished Teaching Fellow"

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**Lovett’s Giving Priorities**

Based on the strategic objectives established by the Lovett Board of Trustees, the following are the school’s giving priorities.

1. **True Blue Annual Fund**

2. **Capital Campaigns** (Endowment and Facilities Gifts)

3. **Special Interest Giving**
   - Friends of the Arts
   - LionBackers
   - Lovett Parent Association
   - Community Service Fundraising
   - Restricted Gifts
   - Fundraising Events
   - Breakthrough Atlanta

4. **Legacy Giving**
   - Bequests
   - Insurance Policies
   - Charitable Gift Annuities
   - Charitable Lead and Remainder Trusts
   - Certain Real Estate Gifts
We make a living by what we get; we make a life by what we give.
— Sir Winston Churchill
Continued endowment growth helps the school maintain reasonable tuition levels while continuing to provide excellent programs and exceptional faculty and staff, which results in smaller, more personalized classes and plentiful co-curricular offerings. Lovett’s endowment total stands at more than $58 million (market value as of June 30, 2013). Visit [www.lovett.org/endowment](http://www.lovett.org/endowment) to learn more.

**New Facilities and Renovations**

Revenues that make up Lovett’s operating budget—tuition, True Blue, endowment proceeds, and auxiliary program income—cannot cover the cost of major physical plant improvements, which frequently run into the millions of dollars. From time to time, new facilities or significant renovations are needed due to the age of existing facilities or the rise of new programs that require specific amenities. Charitable, tax-deductible (as allowed by law) gifts are the chief funding mechanism for such construction. The Buildings and Grounds Committee of The Lovett School Board of Trustees makes all decisions about plant improvements.

The funds for new facilities and renovations are usually raised via a capital campaign or through smaller, focused fundraising efforts. As with endowment commitments, most Lovett constituents make their building fund pledges payable over a three-to-five year period. Current renovations and recent new facilities funded through the current capital campaign include:

- The Academic Resource Center
- Performing arts practice rooms
- The Portman Family Middle School
- Railey Field
- Murray Athletic Center

“Attending Lovett was made possible only through the generosity of Lovett’s financial aid. I am grateful for my Lovett years, and I look forward to giving back for students like myself.

— Lauren Hooten, Class of 2003
The Drama Room in the Portman Family Middle School is a state-of-the-art facility, and would surely be the envy of most university campuses, let alone a middle school. It is inspiring to me as a teacher and as an artist.

— Chris Ekholm,
Middle School drama teacher
New Parent Campaign

The New Parent Campaign is part of Lovett’s year-long effort to educate new parents by providing valuable information and encouraging participation in important facets of school life. Visit www.lovett.org/newparentcampaign to learn more.

New Facilities and Renovations FAQs

Why should I give for new buildings that my child won’t use?

In a school like Lovett, which is almost 90 years old, parents of previous generations of students gave the money to fund the resources your child enjoys today. As the saying goes, all children are warmed by the fires built by others. It’s up to you as a parent of today to make sure that Lovett is here for children 10, 20, and 30 years from now. And, your investment in Lovett’s future will help ensure the school maintains its excellent reputation and the value of its diploma.

When will I be asked for a capital gift?

Schools tend to conduct capital campaigns once or twice a decade. Because the size of the gifts are usually large, you can usually pay your pledge over three to five years.

Why does Lovett ask for a True Blue Annual Fund gift if I’m also making a capital gift?

For the same reason you have to pay your mortgage while you’re putting an addition on your house. The school must continue to meet its operating costs even as it’s making improvements and launching new programs.
As an alumnus and a parent, I know from experience how fortunate a student can be to have truly dedicated, passionate, and caring educators in one’s life.

— David Kahn, Class of 1981
SPECIAL INTEREST GIVING
LOVETT’S THIRD GIVING PRIORITY

**Lovett Parent Association (LPA)**

The LPA generates funds that provide enhancements beyond the school budgets through annual dues of $35. In addition to the annual dues, the LPA invites parents to make contributions for chapel flowers, the Gardening/Greenhouse Fund, or library books. An auction, held every three years, is a major fundraiser for the school. Visit [www.lovett.org > Community > Parent Involvement](http://www.lovett.org) to learn more.

**Friends of the Arts (FOTA)**

Members of FOTA work with the fine arts department to advance and enhance the arts offerings at Lovett. Membership for FOTA ranges from $75 to $250 per family, and other donations are welcomed. FOTA also hosts The Great Conversation, a fundraising event for fine arts, which occurs on alternate years from the LPA’s auction. Visit [www.lovett.org > Community > Parent Involvement](http://www.lovett.org) to learn more.

**LionBackers**

The LionBackers support athletic programs through their “fun raising” and fundraising. Through memberships, concessions, and the annual golf and tennis tournaments, the LionBackers are able to financially assist areas of athletics and physical education not covered by the school budget. Membership for LionBackers ranges from $85 to $250 per family. Visit [www.lovett.org > Community > Parent Involvement](http://www.lovett.org) to learn more.

**Alumni Association**

The Lovett Alumni Association serves as a vital link between alumni, the school, and each other. The Alumni Association aspires to serve and engage Lovett alumni to foster a lifelong intellectual and emotional connection with the school and its graduates; and to provide Lovett with goodwill and support.

The Alumni Association seeks to accomplish this goal through events, activities, and services focused on alumni, students as future alumni, and friends and supporters. Underlying all that they do is a commitment to the value of education, to the well-being of society, and a commitment to diversity, integrity, and service.

Contact Lara Kauffman, Director of Alumni Programs, at [lara.kauffman@lovett.org](mailto:lara.kauffman@lovett.org) or Starr Pollock, Assistant Director of Alumni Programs, at [starr.pollock@lovett.org](mailto:starr.pollock@lovett.org) to learn more.
The Lovett community now has the opportunity to redirect their Georgia tax liability to support independent school education—and specifically a Lovett education!
Private School Tax Credit

In 2010, our trustees unanimously approved participation in the Georgia Private School Tax Credit Program. The Lovett community now has the opportunity to redirect their Georgia tax liability to support independent school education—and specifically a Lovett education! Your participation in this program can help Lovett offer need-based scholarships to new Lovett students in a year when financial need is at an all-time high. Visit www.lovett.org/taxcredit to learn more.

Breakthrough Atlanta (BTA)

Breakthrough Atlanta is a six-year, academically intense, year-round program that provides educational opportunities to talented metro Atlanta public school middle school students, while simultaneously offering a “hands-on” training experience to the teachers of tomorrow. BTA has been hosted by The Lovett School for 20 years and reflects the school’s commitment to serve the greater Atlanta community. Visit www.breakthroughatlanta.org to learn more.

LEGACY GIVING
LOVETT’S FOURTH GIVING PRIORITY

Legacy giving, or planned giving, is a way for donors to “leave a legacy” and have an impact on Lovett beyond their lifetime. It allows donors to make larger gifts than might otherwise be possible. And it may also allow donors to increase their retirement incomes and receive tax advantages.

The Lovett School Legacy Society is a group of loyal donors who have included Lovett in their wills or other estate plans. Their gifts provide essential financial support for the school’s future. Unless otherwise restricted, legacy gifts are devoted to the permanent endowment.

Visit www.lovett.org/legacygiving to learn more.