



REGIS HIGH SCHOOL FOUNDATION • REGIS HIGH SCHOOL • ST. MARY CATHOLIC SCHOOL



SHARING OUR FAITH,  
SHAPING OUR FUTURE

*A Campaign for the Archdiocese of Portland &  
the North Santiam Canyon Vicariate*

*"The speed with which our world is changing is incredible and calls all of us to provide the highest-quality, most current state-of-the-art education possible. This capital campaign will allow both Regis and St. Mary to enhance existing and design new curriculum that will provide our students with the knowledge, skills and tools they need to be successful in whatever next steps they choose."*



Principal Joni Gilles  
Regis High School



*"St. Mary and Regis families care, are involved, and take the time to raise their children in loving homes. When families send their children to our schools, they know that their children are in safe and Christ-centered environments that focus both on individuals and the greater good of the overall community. That starts in the homes of holy families."*

Principal Rick Schindler  
St. Mary Catholic School

Dear Friends,

Students today and tomorrow will be the major beneficiaries of this extraordinary partnership to raise nearly six million dollars for our local Catholic schools and the Catholic Church in Western Oregon through “*Sharing Our Faith, Shaping Our Future.*”

The Regis High School Foundation, on behalf of St. Mary Catholic School and Regis High School, is leading this joint capital campaign with the Archdiocese of Portland and the five Catholic parishes of the North Santiam Canyon Vicariate.

We are appealing to thousands of families, friends and alumni in the vicariate, and through Oregon and the entire nation. We ask that everyone join us and make a commitment commensurate with the importance of this campaign as it benefits the church and our children.

The five-year campaign seeks to raise nearly \$6 million to fund the following projects:

**For the Archdiocese of Portland:**

\$750,000 in support of the special All-Parish archdiocese campaign to fund Seminary Education, Priest Retirement, and Catholic Education/Faith Formation. Further details are found in a separate case statement.

**For the Regis High School Foundation:**


1. \$3,500,000 for Endowment to support Regis High School and St. Mary Catholic School. We are accepting cash gifts as well as deferred gifts to make this goal. The Foundation makes contributions to the schools amounting to 4% of its assets each year. These funds support both schools with:
  - General Support
  - Tuition Assistance
  - Named Scholarships
2. \$1,500,000 to fund opportunities created with the transformation of Regis High School and St. Mary Catholic School into a seamless, accessible, and high quality PK-12 Catholic School System. Funding priorities include:
  - Increased tuition assistance so that no child is denied a Catholic education due to cost;
  - Capacity building assistance to further develop and enhance a fund raising and marketing program to advance the new operating system;
  - The STEM Initiative (Science, Technology, Engineering, and Math) to boost curriculum needs to enhance college and workplace opportunities for our graduates;
  - An integrated Performing and Fine Arts program;
  - Other teaching-learning improvements including professional development and possible technology infrastructure upgrades.


In addition, the St. Boniface and St. Mary-Shaw parishes want to raise \$102,000 to seed future capital improvement projects (separate case materials are available). Once local project goals are met, these parishes will earmark surpluses to the Regis High School Foundation projects. Immaculate Conception, Our Lady of Lourdes, St. Catherine of Siena all have identified the Regis High School Foundation projects as their own.

We are pleased that dozens of volunteers from each parish and beyond have stepped up to help make this campaign a success. We are relying on their donations of time and talent to make a personal contact with everyone receiving our campaign materials.

Please join us in supporting this critical campaign for our church and children.

Yours In Christ,

  
Tom and Carolyn Lulay  
Co-Chairs

  
Jon A. Heuberger  
Co-Chair





# OUR HISTORY, OUR FUTURE



- The Catholic schools in Santiam Canyon were
- founded by faithful Catholic families and clergy
- who shared the conviction that preparing youth
- to become good citizens in society following the
- example of Christ the King was important.

- In order to fulfill that dream, St. Mary Catholic
- School was established in 1929 by Father Francis
- Scherbring. Regis High School was created in 1963
- as an Archdiocesan school with donations from
- local logging and farming families throughout the
- vicariate.

- Over the years generations of students have grown
- up in these schools to be productive citizens of
- our state, country, and world. Since 1991, the St.
- Mary\* Regis Annual Fund has functioned as a
- shared fundraiser with proceeds split or designated
- as per the donor's request to either school. In 1998,
- a combined schools capital campaign resulted
- in a new classroom building at St. Mary and an
- all-purpose, activity center at Regis. Since this
- joint campaign, the schools merged independent
- newsletters to alumni and families into a single
- publication.

- While fundraising and communications have
- worked well in partnership between the schools, for
- many years, St. Mary and Regis have co-existed and
- functioned as two separate education institutions.

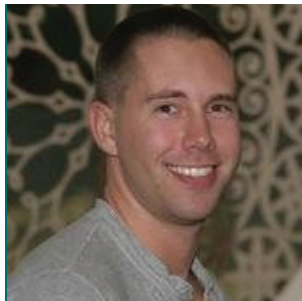
After many years of prayerful deliberation, a joint operating agreement has been recently approved in order to create a PK-12 Catholic school system. Leaders of both schools see great advantages for students, faculty, families, and the community. Becoming closer to one in vision and mission will increase the schools' ability to provide academic excellence for the students.

Created in 1976, the Regis High School Foundation's purpose is promoting and furthering the development of Regis High School and St. Mary School by receiving and administering funds for scholarship and educational activities for the schools.

The goal of the Regis Foundation is to build student enrollment through scholarships and financial aid, to stabilize school finances through a strong annual fundraising program, and to create a long-term endowment fund through direct gifts and planned estate gifts.

Please look at the QUICK FACTS on the reverse side to learn more about the Catholic schools of Santiam Canyon

*“Regis High School provides a setting in which students can feel safe and explore their intellectual curiosities.”*

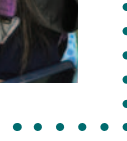


Ryan C. Meldrum, Ph.D.,  
Class of 2000  
Assistant Professor,  
Florida International  
University



- Tom Welter, Class of 1967
- Executive Director, Oregon
- School Activities Association

*“Regis did a great job of developing me academically and preparing me for college. But it provided so much more than that. It instilled character, values and ethics during a very critical time of adolescent growth and development.”*



*“Regis can be summed up in a single phrase: “Preparation through balance.” A balanced education can mean a lot of different things; academics, athletics, social interaction and spiritual development. Regis allows a person to excel at all of these, which in turn provides well-rounded, successful individuals for the future.”*

Craig Gries, Class of 1993  
President, Oregon State  
Bridge Construction, Inc

## METHODS OF GIVING

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 your financial advisor to determine which method of contributing is most beneficial.

### Pledges

Pledges are commitments of payments to be made over time. Leaders of this campaign are asking donors to consider five-year commitments. We encourage all donors to consider a 10 percent to 20 percent initial payment to begin your commitment. Please remember that payments on pledges are deductible for income tax purposes as provided by law.

### Gifts of Cash

Gifts made by cash or check are the most common and will allow campaign beneficiaries to address immediate needs. Checks should be made payable to “*Sharing Our Faith, Shaping Our Future.*” Visa and MasterCard are also accepted as are Electronic Funds Transfer from any financial account.

### 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. For example, if you donate stock purchased for \$2,000 that you have owned 12 months or more, and the stock is now worth \$10,000, your tax deduction will be for the full \$10,000.

Using depreciated stock in your giving plans has its advantages, too. 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.

### Deferred or Planned Gifts

Deferred gifts help insure the future of our schools. A deferred gift through an estate plan or life income gift offers you the ability to support Regis High School Foundation but retain the income from those assets during your lifetime. Planned giving is the process of carefully selecting the best method and assets for making a charitable gift. 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, among others:

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

### Life Insurance

You may donate to the campaign by making Regis High School Foundation the owner and beneficiary of your insurance policy. If you are finished paying for the gifted policy, your deductible gift is the replacement value or the cost basis of the policy, whichever is less. You may also donate a life insurance policy on which you are still making payments. Future premiums on a donated policy are also deductible. Life insurance gifts are simple; just ask the insurance company for the appropriate forms to make the Regis High School Foundation the owner or beneficiary of a policy.

### Matching Gifts

Many employers offer a matching gift program. Such programs are often open to board members and retirees as well as employees. For information and required forms, check with your company’s human resource department.

While the Regis High School Foundation is an excellent resource for information on various charitable giving methods, this information is not intended as legal advice. You are advised to consult your own qualified professional advisor for specific recommendations.

## MEMORIAL OPPORTUNITIES

Memorial opportunities are available in the “*Sharing Our Faith, Shaping Our Future*” campaign. Named endowment funds, including memorial funds, are available with a minimum gift of \$10,000 to the Regis High School Foundation. Please contact the foundation for more information.

# QUICK FACTS

## REGIS HIGH SCHOOL FOUNDATION

Year Founded: 1976  
Funds under management  
(Endowment Size): \$2.8 million

Investment strategy: 60% equities and 40% cash fixed income using Charles Schwab mutual funds

2010 Distribution in dollars: \$192,450

2010 Distribution as a percentage: 6.9%  
(with 4% minimum target annually)

### Fund Manager

Board of Directors, Regis High School Foundation,  
which includes three licensed securities dealers

### Board of Directors & Officers

Jon A. Heuberger - 2011, President  
John Meldrum - 2011, Vice President  
Rob Freres - 2011, Secretary  
Ron Bochsler - 2011  
Larry Etzel - 2013  
Tom Fessler - 2013  
Doug Highberger - 2012  
Kevin Joyce - 2012  
Larry Keudell - 2011  
Jerry Weis - 2012  
Lindsey Zuber - 2013

### Ex-Officio Members

Joni Gilles, Principal, Regis High School  
Rick Schindler, Principal, St. Mary Catholic School  
Madeleine Gere, Executive Director

### Contact

Executive Director: Madeleine Gere  
(503) 769-2159 X 210  
PO Box 533, Stayton, Oregon 97383-0533  
[www.regishighschool.net](http://www.regishighschool.net)

## ST. MARY CATHOLIC SCHOOL

St. Mary Catholic School is dedicated to providing a challenging academic environment centered on faith, learning, and service.

Year Founded: 1929  
2010-11 PK-8 Enrollment: 227  
Faculty Size (FTE): 14  
Staff Size (FTE): 9

43% of Students receive Financial Aid  
Average tuition assistance award: \$1250 per child  
94% of Students who are Catholic

### 2010-11 Tuition

\$3,375/\$4,225

### 2010-11 Fees

\$100 registration per family / \$150 books per child

### 2010-11 Revenue & Expense Budget

\$1,207,000/\$1,207,000

### Endowment or Quasi-Endowed Funds

\$284,000

### Fund Manager

Archdiocese of Portland Investment Pool

### Accreditation Body & Year

Western Catholic Education Association and the  
Northwest Accreditation Commission, 2007-08

### Contact

Principal: Rick Schindler  
(503) 769-2718  
1066 N 6th Avenue, Stayton, OR 97383  
[www.stmarystayton.org](http://www.stmarystayton.org)

## REGIS HIGH SCHOOL

Regis High School, a Catholic educational community, strives to be accessible to all students and meet their varied academic needs. Regis affirms the uniqueness and dignity of individuals, inspires the pursuit of excellence, fosters faith and develops a commitment to service and justice through a balanced academic and co-curricular program.

Year Founded: 1963  
2010-11 Enrollment: 132  
Faculty Size (FTE): 12.17  
Staff Size (FTE): 5.33

34% of Students receive Financial Aid  
Average tuition assistance award: \$2,758  
86% of Students who are Catholic

### 2010-11 Tuition

\$5,425/\$6,275

### 2010-11 Fees

\$200

### 2010-11 Revenue & Expense Budget

\$1,263,786/\$1,263,786

### Capital & Contingency Reserve Fund

\$1,081,000

### Accreditation Body & Year

Northwest Accreditation Commission, 2007

### Contact

Principal: Joni Gilles  
(503) 769-2159  
550 West Regis Street, Stayton, OR 97383  
[www.regishighschool.net](http://www.regishighschool.net)



### Campaign Office

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