

# LANDMARK *of* LEARNING

**2016-2017 PLEDGE YEAR**



# LANDMARK OF LEARNING

## IMPORTANT CONTACTS

### PRINCIPAL

#### **HERB HARTMAN**

*hhartman@bergmanacademy.org*

### FINANCIAL MANAGER

#### **MELANIE OWENS**

*mowens@bergmanacademy.org*

### BOARD OF DIRECTORS

#### **SCOTT JOHNSON • Chairperson**

*scott.johnson@ipmvs.com*

#### **TINA FISHER • Vice Chairperson**

*fishertinalb@yahoo.com*

#### **STEPHANIE KEMPF • Past Chairperson**

*skempf@outlook.com*

#### **FRANK LEVY • Director of Strategic Planning**

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#### **JEFFRIANNE YOUNG • Director of Communication**

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#### **STEPHANIE PICKENS • Director of Finance**

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#### **MICHAEL GALLOWAY • Legal Counsel**

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#### **NATE OLSON-DANIEL • Director of Technology**

*nolson-daniel@lightedge.com*

#### **SALLY ELLWEIN • Director of Volunteer Resources**

## DEAR BERGMAN FAMILIES:

We understand that the decision of where to educate your child is one of the most significant choices your family makes each year. We are grateful you are choosing Bergman Academy for that journey, and we hope that journey continues through eighth grade graduation.

Several significant attributes distinguish our school. Our extremely low student-to-teacher class ratios, our challenging curriculum choices, our learning environment, and our 80-acre forested setting all contribute to our consistently high test scores and great reputation. While these are expensive options to provide, they are critical to our school identity. This successful combination has helped us enjoy unprecedented growth of over 350% in the last 10 years!

Our tuition accommodates all expenses related to operating a school: faculty and staff salaries, textbooks, school supplies, facility maintenance, etc. Now we find ourselves experiencing the best possible problem — as we fulfill our plan of two classes per grade in Pre-Kindergarten through 8th, we have outgrown our Windsor Gallery. We need an activities center, which will serve as a multi-purpose gymnasium, performance and gathering space. This capital project and other capital improvements are what Landmark of Learning is all about. By separating capital projects from our cost to educate, we are able to keep tuition increases to a minimum. A video detailing our complete expansion plan is posted at [www.bergmanacademy.org](http://www.bergmanacademy.org). Click on the 'Support Us' tab, then on 'Landmark of Learning 2015 Video' to view the video presentation.

Your help is essential to our continued growth and progress. We need every family to participate in the Landmark of Learning Campaign. 100% family participation is what sustains our school, our values and our success.

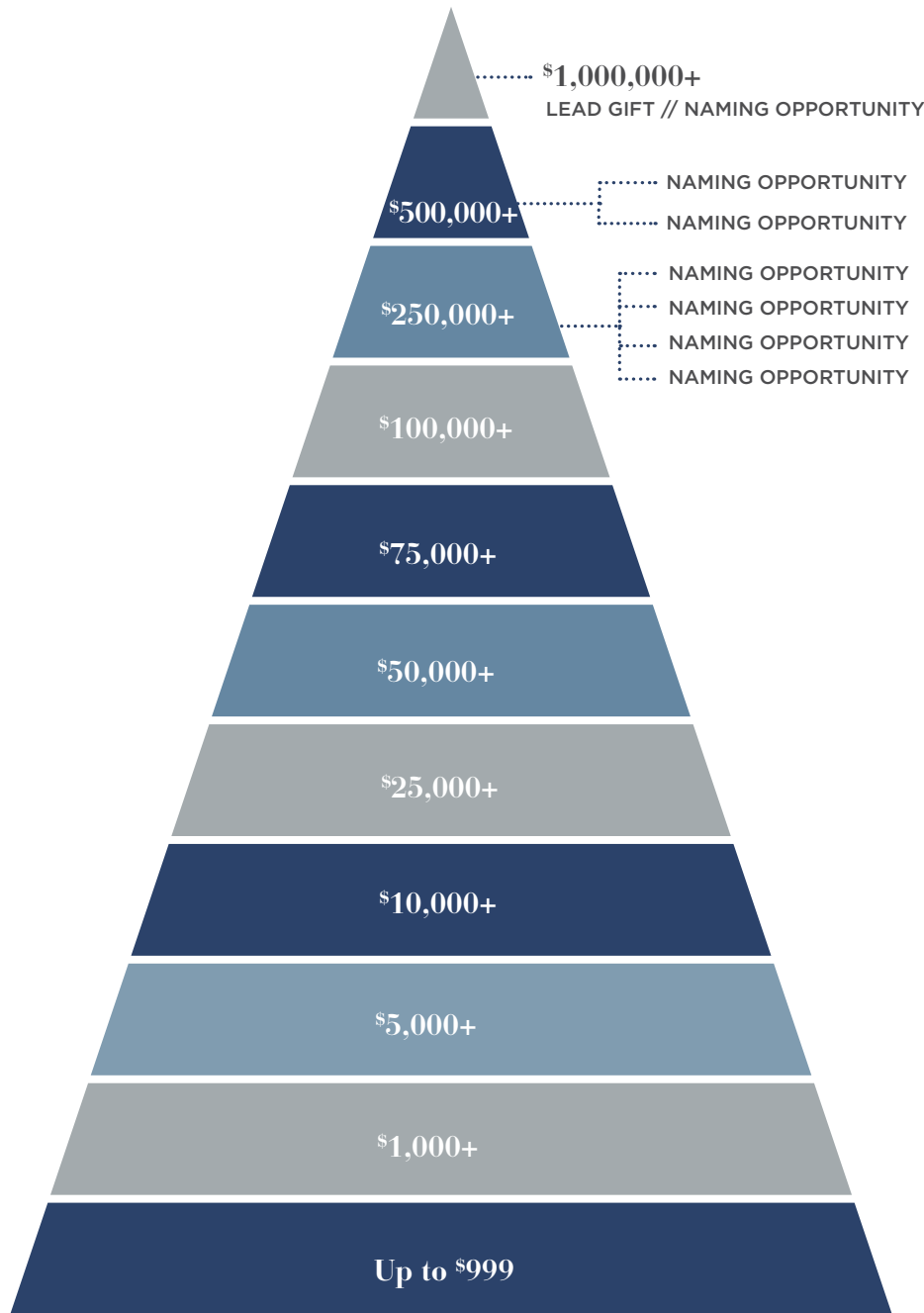
Please reflect on what your family can contribute to the campaign. We only ask once per year and are open to single year gifts or two- and three-year pledges. If you have questions about your gift, please feel free to contact us.

WITH GRATITUDE,

*Your Bergman Academy Board of Directors*

# LANDMARK CAPITAL CAMPAIGN

## ANNUAL GIVING FUND LEVELS



# GIVING REPORT

## 2015-2016 REPORT

**\$1,000,000+**  
LEAD GIFT

Naming Opportunity

Gartner, Michael & Michelle  
Gilcrest /Jewett  
Hockmuth  
Holmes Murphy  
Iyer & Mathrubutham  
MidAmerican  
Wirt\*

Shetye  
Shumway  
Steffes  
Steinberg  
Stenberg  
Swanson  
Vahanian  
Waters  
Wilson

Gibson  
Ginsberg  
Goldenberg  
Grant  
Halbrook  
Hilker & Rowley  
Holtz  
Ibsen  
Jagiello

**\$500,000+**

Naming Opportunity  
NAMING OPPORTUNITY

**\$1,000+**

Adddy

Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous

Zafar & Husain  
Zapatier & Maya

Jithendra & Shamarao  
Johnson, Scott & Yulia  
Konior

**\$250,000+**

Naming Opportunity  
NAMING OPPORTUNITY  
NAMING OPPORTUNITY  
NAMING OPPORTUNITY

**Up to \$999**

Adelman  
Ahmed

Andersen  
Anderson  
Anonymous  
Anonymous  
Anonymous  
Anonymous  
Anonymous

Bergman  
Bhargava  
Brown, Dion & Carmencia  
Christie  
Cook  
Davis  
DeVolder  
Downs  
Fanter  
Freund

From & Hoganson

LaMasters  
Lieberman  
Luft  
Martinie  
Miller  
Mock  
Mulvihill  
Narayanan  
Owens, Melanie  
Pulver  
Roth  
Ruddock  
Schnurstein  
Shepardson  
Tamisiea  
Tvrdik  
VanHeukelom  
Wahlert & Atkin  
Wells  
Whisenand  
Wilke  
Williams  
Zambreno  
Zeff

**\$100,000+**

Bernau\*

Bailey  
Blanchfield  
Bubar & Albrecht  
Clark & Reinhart  
Coslin  
Ekhardt  
Ellwein  
Ferrari  
Fry  
Galligan  
Gamble  
Gass & Vaughn  
Goldman  
Guanci  
Gusse  
Holmes  
Horning  
Johnson, Scott & Stacey  
Kempf  
Kim  
Krueger & Johnson  
LaPrade  
Magerko  
Marentes-Gonzalez  
Meyer  
Mirsky & Milani  
Owens & Dassanayake  
Parks  
Phelps  
Pletcher  
Raker  
Schofield  
Scott

**\$75,000+**

Newbury (in-kind)\*

**\$50,000+**

Cohan\*  
Dryden\*  
Galloway\*  
Levy\*  
Reynal\*

**\$25,000+**

Bankers Trust\*  
Hockmuth\*  
John Ruan Foundation\*  
Nelson\*  
Olson-Daniel\*  
Young\*

**\$10,000+**

Prairie Meadows  
Raker Rhodes (in-kind)  
Wallace, Sam & Sally

**\$5,000+**

Brown, David & Susan  
Burch  
Fisher

2015/2016 LANDMARK  
CAMPAIGN PLEDGE TOTAL  
**\$98,825**

Corporate matches were made by Dickson Industries, Inc., Meredith Corporation, Microsoft Matching Gifts Program, MidAmerican Energy Foundation, Principal Financial Group Foundation, Washington Post/ Graham Holdings, The Wellmark Foundation, Wells Fargo Matching Gift Program

\* Previously noted for construction  
This list is both current and past families

## *What is the Landmark of Learning Annual Fund and what does it support?*

Supporting an annual fund is part of the culture at most strong independent schools. Bergman Academy continues this tradition through its Landmark of Learning campaign each fall. During this annual campaign, each family pledges their support with a voluntary and tax-deductible gift.

The Landmark of Learning Annual Fund specifically supports:

- Physical classroom and campus growth
- Upgrades to our existing facility
- Unique and innovative programs for our students
- Technology upgrades and infrastructure

A strong Annual Fund is a key indicator of family commitment, which is an important criterion as Bergman Academy seeks alternative financial support via foundation grants, corporate donations and loans.

## *What is the financial and/or participation goal for the Landmark of Learning Annual Fund?*

Every fall, the goal for this initiative is to achieve 100% participation from our parent community. Each school year's challenges and initiatives will present different price tags, but we remain focused on participation rather than contribution levels. Our fundraising goal is raising \$250,000 during this year's campaign which is a little less than \$1000 per student.

However, gifts of all sizes are necessary and appreciated. We know that members of our parent community will determine gift levels that make personal sense year by year. When applicable, we ask parents to encourage grandparents, alumni, businesses and Greenwood Park neighbors to join in support of our not-for-profit school.

## *How many more fundraisers will there be this year?*

Historically, the school conducted separate capital campaigns, hosted auctions and events, and engaged in myriad mini-fundraisers. Out of respect for personal time and other philanthropic interests and engagements, we consolidated our efforts and expectations to one annual fund – The Landmark of Learning.

This is the one appeal each year in which each family is expected to participate. Small optional fundraisers that have become part of the school culture, like Spellebration, Trunk-or-Treat, SCRIP, and other promotions will continue.

## *Why do we need to contribute beyond what we already pay for tuition?*

Bergman Academy operates successfully under a financially conservative model in which tuition covers current staff and day-to-day facility operating costs. We adjust tuition as these costs change.

Thus far, this approach has succeeded in meeting the school's operating requirements, keeping the tuition as low as possible. However, as we continue to grow, we need to raise funds beyond tuition to ensure that our children experience the full breadth of academic opportunities that their peers across the country enjoy.

## *What is the long-term vision for the school?*

In 2010, we added a second section of Kindergarten. As we have continued to gradually expand this strategy, we have also expanded our building and grounds. This past summer, we installed a new playground which we gifted to the city of Des Moines. We also finalized a physical addition to the building, allowing us to open five new classrooms and a fully-equipped science lab for our 6th, 7th, and 8th grade students. In the near future we need to finish the second science lab and classroom. We can also focus on our next goal: the creation of a student activities center featuring a gymnasium and auditorium space.

## *What steps are being taken towards this long-term vision?*

Architectural and landscape plans are being finalized for a second large addition to Bergman Academy featuring gymnasium and auditorium space.

Additional fundraising has begun in earnest, and this year's Landmark of Learning campaign is an important step in realizing our long-term vision. Support from school families, philanthropic individuals, and interested corporations and foundations means we can avoid raising tuition to cover our expansion.

## *How does pledging and payment work?*

The Landmark of Learning Annual Fund begins each fall with a kickoff in October. Pledges are due on November 15 and can be fulfilled either in whole, in parts, or through monthly payments. Checks, school billing, or credit cards are accepted for payment.

## *What if a contribution is not possible for my family this year?*

We are keenly interested in achieving 100% participation by our families in this program, no matter the size of the gift - whether it's \$25 or \$250,000. If a pledge is absolutely not possible for your family this year, please contact Melanie Owens before November 15.

## *With whom may I speak if have further questions?*

Any questions about the Landmark of Learning Annual Fund should be directed to a member of the school's board of directors, the principal, or the school's financial manager. All relevant contacts are listed on page 1.

## *Can I make a gift of stocks, securities or other assets? Can estate or bequest gifts be made? Does Bergman Academy accept corporate matches?*

Yes. The school's financial manager can handle these transactions. Please be in touch with her at the contact information listed on the contacts page.

Non-monetary gifts will be recognized at their market value. Corporate or employer matches will be recognized both by the business contributor and added to the family's recognition total. Classroom and other naming opportunities are available at higher levels of giving. Questions on those opportunities can be directed to any member of the school's board of directors.

## *Are my gifts tax deductible?*

Bergman Academy is a non-profit 501(c)(3) corporation and all gifts are tax deductible for the calendar year in which they are received.

## *How are Landmark of Learning Annual Fund gifts recognized?*

Annual Fund gifts are recognized in the Landmark of Learning report each year which is visible on our website and printed materials. Plans for a donor wall within the school are currently being finalized.

Every family,  
every year.

LANDMARK OF LEARNING MOTTO





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