



BCS

Bishop's
College
School

Guide to Giving and Getting Involved



A History of Philanthropy

BCS is a school that has quite literally been built by philanthropy. Our founder, Reverend Lucius Doolittle, relied on support from a handful of families to establish a small school for boys in 1836. By 1916-17, the school was a respected educational institution that was able to build the magnificent current-day School House, Chapel, and Ross Hall through the support of Commander J.K.L. Ross (BCS 1895). This massive project, funded entirely through philanthropic support, was celebrated through an inauguration ceremony attended by British royalty. Thanks to continuing generosity over the following decades, our infrastructure has grown alongside an endowment that has established scholarships, financial assistance, and programs that offer exceptional opportunities to youth.

Today, BCS prides itself on the largest per-student endowment in Canada and a beautiful 240-acre riverside campus, all made possible through the philanthropic support of parents, grandparents, alumni, and friends of the school.



An article from the 1918 edition of the *Montreal Standard* shows the inauguration of Bishop's College School. Pictured left are Capt. Kenyon-Slaney, Commander J.K.L. Ross (who donated the buildings), and Victor Cavendish, 9th Duke of Devonshire and the Governor General of Canada, after a visit of School House.

Community Involvement

BCS encourages parents, grandparents, alumni, and employees to participate actively in the school community through volunteerism, as well as financial support beyond tuition. It is only through a highly engaged community that we can continue offering a first-rate and well-rounded educational experience.

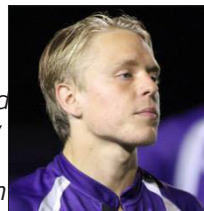
A Parent & Alumnus' Perspective

"Based on my experience as a student and as the father of a recent graduate, it is my view that BCS is one of the most remarkable high schools in the world, offering a first-class academic, sports, and cultural program in a warm and bilingual environment that permits its students to be successful in life as contributors and leaders.



Robert P. Charlton, B.A.,
M.A., B.C.L., (BCS'67).

In my view, what makes the BCS environment so special goes well beyond the school's beautiful and well equipped campus, the unusually small classes, the attention given to each student by its devoted staff, and the insistence on excellence and self-discipline, both on and off the field. What truly makes it so valuable is the national, social, cultural, and religious diversity of its 240 girls and boys from more than 30 countries. In this secure microcosm reflecting the best aspects of our emerging global village, they experience firsthand its promise of mutual respect and cooperation.



Nicolas Charlton, (BCS'11)
is a student at Bishop's
University and Captain of
its Gaiters Rugby team.
He coaches rugby and
squash at BCS.

I have witnessed how their experience and lifelong friendships enrich not only their own lives but those of their families and communities around the world.

For nearly 180 years, the vision and generosity of countless graduates, their families, and friends of the school have permitted BCS to become such a beautiful place. I am proud to contribute to that legacy of giving, as both an alumnus and a parent of a recent graduate."

Robert P. Charlton, B.A., M.A., B.C.L., (BCS'67)

Father of Nicolas Charlton (BCS'11), Robert retired in 2015 as a Senior Partner from one of the world's largest law firms. He previously studied international affairs under the guidance of the late Rt. Hon. Lester B. Pearson who inspired his belief in equal opportunity and international cooperation.

Active Participation

Parents and alumni are encouraged to take an active role in school life. Local families are encouraged to visit BCS often, attending events and volunteering for co-curricular programs and events. Boarding parents and more distant alumni can connect with the BCS community regularly by following school activities on the BCS website and social media, by attending major events like the *Festival of Nine Lessons and Carols* and the *Annual Review of the BCS Cadet Corps*, and by attending BCS Alumni & Friends events held around the world each year. Volunteer opportunities are further outlined on Page 5.



In May, alumni and parents have the opportunity to see the students in the Annual Review of the BCS Cadet Corps.



International travel opportunities abound at BCS. Parents and alumni often participate as volunteer chaperones.



Alumni stay engaged in the BCS community by volunteering to lead co-curricular programs. François de Sainte Marie (BCS'65) coached his grandsons on the squash team at BCS.



The family of Form II student Aidan Condo presented the culture of the Micmac First Nation during morning assembly in October 2014.



www.facebook.com/bishopscollegeschool



www.instagram.com/bishopscollegeschool



www.twitter.com/bcs_today

Volunteer Opportunities

Broad and diverse engagement of volunteers allows BCS to thrive and offer experiences that enrich young lives. Leading by example, parents, alumni, and friends can contribute their time and make a difference at BCS.

Alumni & Parents Spotlight Presentations

We regularly invite alumni and parents to share their expertise and experience with students. Spotlight presenters have included celebrated authors, athletes, movie producers, scientists, and leaders in business and the arts.

Parent Association

BCS parents are encouraged to connect with the Parent Association, which participates actively in school life by welcoming new families and supporting student initiatives, special programs, and fundraising. A steering committee is elected each year to guide the efforts of the Association.

BCS Ambassadors

BCS alumni and parents are part of a worldwide network that includes leaders in business and finance, science and medicine, the arts, education, law, politics, and much more. BCS helps its community to stay connected, and Ambassadors help raise worldwide awareness of school initiatives.



Alumnus Maxime Descôteaux, Ph.D. (BCS'98) spoke in Chapel in April 2014.

Maxime is an Associate Professor at the Université de Sherbrooke whose leading-edge brain research was featured in the February 2014 edition of *National Geographic*.

Right: Okill Stuart (BCS'37) is a WWII Veteran who participated in the D-Day landing and the Battle of Normandy.

On Feb.15, 2015, in honour of the 50th Anniversary of the Canadian Flag, Mr. Stuart returned to BCS to share his stories about the school and the war.

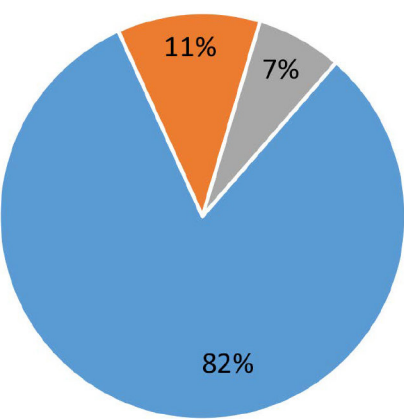


Financial Overview

BCS delivers an outstanding student experience due to generous financial support beyond tuition from parents, alumni, employees, and friends of the school. Donations from our community provide scholarships and financial assistance, cutting-edge equipment, outstanding facilities, and funding for leadership programs like an adventure expeditions and international tours. We invite parents, alumni, employees, and friends to donate annually at the level they are able, and also contribute to special campaigns. All gifts will help students and the school community thrive.

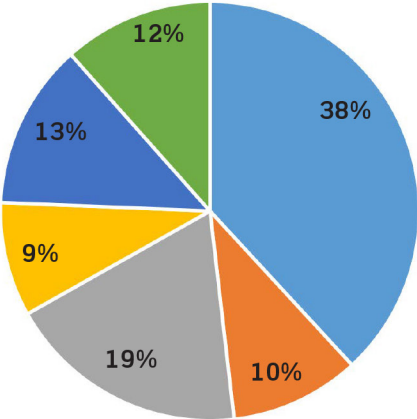
BCS receives no annual grants from municipal, provincial, and federal governments. The school relies on charitable giving to fund projects beyond regular operating expenses covered by tuition. Revenue sources and their uses are indicated below:

Sources of Funds



- Tuition & Fees
- Annual Giving & Endowment Income
- Rentals and Other Income

Uses of Funds



- Instructional
- Administration
- Physical Plant
- Financial Assistance
- Advancement & Admissions
- Food & Domestic Services

BCS is a registered charity with the ability to provide tax receipts for qualifying donations in Canada and the United States. The BCS Foundation, which oversees management of the school’s endowment, receives and processes donations and tax receipts.

Giving Opportunities

Annual Giving

Annual giving is an important source of financial support for scholarships, financial assistance, special projects, and many of the extras that make our academic, athletic, and leadership programs unique.

Each year, members of the school community receive a letter asking for their support. We ask parents, alumni, employees, and friends of the school to make BCS a philanthropic priority.

Donations of all sizes are welcome. In fact, participation itself is in many ways as important as the amount given; a sense of community is strengthened when everyone gives and feels invested in the school's mission of educating today's youth. Gifts can be directed to specific areas or to the Highest Priority Fund for important projects identified by administration each year.

Gifts are recognized in the *BCS Bulletin* according to the following giving categories unless the donor chooses to remain anonymous:

Visionaries (\$500,000+)

Founder's Circle (\$100,000+)

Builder's Circle (\$50,000+)

Benefactor's Circle (\$10,000+)

Chairman's Circle (\$5,000+)

Director's Circle (\$1,000+)

Head of School's Circle (\$500+)

Prefect's Circle (\$250+)

Friends (< \$250)

Major Gifts & Capital Campaigns

Every major step forward at BCS has been, and continues to be, funded by parents, alumni, and friends who make significant commitments to the school. Major gifts and capital campaigns fund large projects, including construction and renovation of buildings, purchases of equipment and capital assets, new endowments for scholarships and financial assistance, and other special projects. BCS is now preparing for a new era of education excellence. Parents and alumni will be consulted on the strategic vision and invited to participate.



The ceremonial re-opening of McNaughton House after a complete renovation was completed in 2014. Cutting the ribbon at Head of School William Mitchell (BCS'63), Chair of the Board Tim Price (BCS'75), Head of House Brendan Barritt (BCS'15), and donor Scotty Fraser (BCS'46).

Giving Methods

There are many different ways to give to BCS. When you are ready to make a donation, you may wish to consider one or more of these giving methods:

Gifts of Cash: A donation of cash provides immediate support to students. You can make a one-time donation, or a pledge to be paid over several years.

Gifts of Securities: Gifts of appreciated securities are an exceptional way to support BCS while realizing significant tax savings. Canadian legislation has eliminated capital gains tax on gifts of publicly traded securities to registered charities. By donating securities, you will earn a tax receipt for the full market value on the date the gift is made.

Endowment Gifts: Your gift to the BCS endowment will ensure that students continue to benefit from your support in perpetuity. The principal amount of your gift will be invested to generate income that supports BCS programs.

Planned Giving

One of the most effective ways that donors can both support BCS and achieve tax benefit is through planned giving. Planned gifts are made by including BCS in estate plans in the form of bequests, or through a variety of investment tools like life insurance and gift annuities which can significantly reduce estate and income taxes while bringing important long-term support to the school.



Our beautiful Student Centre, opened in 2004, was a gift from the late Senator Hartland M. Molson (BCS'24).

Bequest: Making a gift to BCS in your will leaves a legacy to BCS while achieving estate tax benefits. Your gift, whether it is a specific sum or property or a percentage of your estate, provides long-term support while providing tax benefits to your estate.

Gift of Life Insurance: Contributions of life insurance allow you to make a large donation in future years through modest contributions now. By purchasing a new life insurance policy and naming BCS as the beneficiary, the premiums paid are treated as donations eligible for a tax receipt. Alternatively, by donating an existing policy, you can receive tax benefits for the cash surrender value and any accumulated dividends or interest.

Gifts from US Residents

Tax deductible gifts may be made from the US by donating to Friends of Bishop's College School Inc. (FOBCS), a registered 501C charity that provides tax receipts for U.S. residents. Gifts to FOBCS are transferred to the school.

Tax Benefits

Eligible donations to the Bishop's College School Foundation and Friends of Bishop's College School, Inc. will receive a tax-deductible receipt. How does that impact your tax bill?

The range of Federal and Provincial tax credits depends on your province, but ranges between:

- 22-29% for the first \$200 donated
- 42-50% for any amounts over \$200

Other important information that you should know about tax credits:

- Donors of publicly traded securities pay no capital gains tax on the sale of securities, thereby creating opportunities for major increases in tax benefit;
- Tax receipts may be carried forward for up to five years;
- You can obtain tax credits for RRSP/RRIF/insurance plans that name BCS as a beneficiary;
- Bequests are creditable on the final tax return up to 100% of income and may be carried back one year.

We Are Happy to Help

Planning your donation strategy and maximizing tax benefit can be a daunting task. We are happy to help. If you would like to discuss your giving options, please contact Greg Stevenson, Director of Advancement, at 819.566.0238 x209 or by email: gstevenson@bishopscollegeschool.com.



The BCS Advancement Department. Left to right: Database Manager Lyne Labrecque, Archivist Merrylou Smith, Event Management & Communications Coordinator Catherine Ruscigno, Alumni Services Coordinator Susan Cook, and Director of Advancement Greg Stevenson (BCS'87).

Frequently Asked Questions

How do I get involved at BCS if I'm a parent or alumna/us living outside of the area?

BCS welcomes parent and alumni participation at the school and abroad in various ways. Major school events, such as the *Festival of Nine Lessons and Carols*, the *Stoker Arts Festival*, the *Annual Review of the BCS Cadet Corps*, as well as drama productions and concerts all provide opportunities to visit and participate directly in the school community. We also travel around the world each year, hosting Alumni & Friends Evenings and promoting the school at education fairs. Join us! We would love to connect with you. On an on-going basis, school news can be followed from a distance through our website and social media. Those that want to be more involved can volunteer as BCS Ambassadors or members of the parent or alumni associations.



BCS welcomes parent, staff, and alumni each year as guest singers in the Choir for the Festival of Nine Lessons and Carols. The event has been a highlight on the school calendar for decades

Why does the school ask for contributions in addition to tuition?

An independent school relies on investments from its community in the form of both tuition and donations. BCS strives to set tuition as low as possible to maintain the accessibility and competitiveness of the school. While tuition covers the majority of operating costs, many programs that students and families appreciate most require additional support through philanthropy. Maintaining the lowest possible tuition leads to diverse and strong enrolment at BCS, which strengthens our community and programs by attracting high-achieving students regardless of financial means. The most successful independent schools are in fact those with competitive tuition rates and outstanding community support. Furthermore, tax laws encourage donations to education, allowing supporters to deduct their gifts and achieve tax benefit.

What are the tax benefits of donating?

Canadian and US donors receive an official receipt for income tax purposes, which can lead to significant reductions in income tax payable. While individual financial situations and tax jurisdictions impact the exact level of credit, the usual range is between 40% - 53% of the donation amount. Planned giving and donations of capital assets like securities can result in much higher tax benefit, so consulting a financial advisor is recommended.

May I direct my contribution to a specific area of the school?

Yes. As part of the annual giving appeal, donors are given the option of directing their gift to particular areas, including financial assistance, endowment, academics, athletics, and more. Gifts to the Highest Priority Fund assist the administration by providing the flexibility necessary to fund important projects each year that do not fit in the usual categories. BCS strictly honours donor wishes and, where appropriate, reports back on the use of funds.

How can a small donation make a difference in such a large organization?

Participation at any level sends a message of support to our community. A well-supported annual appeal is a sign of a healthy school community, providing evidence of engagement in and support for the school's mission. Major donors are often influenced by the percentage of parents, alumni, and staff that donate, regardless of amount.



"Giving to BCS supports the education and balanced development of the next generation. By providing outstanding youth with opportunities and an environment in which to build knowledge, ability, confidence, and understanding, we prepare them to have a positive influence in life as contributors and leaders. The investment of our community makes a major difference in this important process."

Greg Stevenson (BCS '87)
Director of Advancement



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