

- ⊗ Uncompleted
- ↑ Priority
- ☑ Completed
- ↻ Ongoing
- ⊗ Initiative Withdrawn

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Financial Advancement and Tuition Management

- ↻ Provide planned-giving opportunities to families who have the desire to support the school through their estate planning, land, and stock donations. **Completed and ongoing.**
- ☑ Increase the level of participation in the WES 500 financial aid fund with multiple options of giving annually. **Plan and calendar completed; implementation has begun.**
- ↻ Initiate a faculty endowment fund that will help support annual increases in salary and stipends, as well as honor special recognition and innovation. **Matching gift announced in 2013 – PTL.**
- ↻ Become more involved with ongoing legislation that supports tax credits for N.C. private school families. Secure the services of facility auditors who can identify reasonable and wise reductions in operational savings. **PTL for the recent legislation that was passed.**
- ↻ Consider the financial advantages and disadvantages of renting some of our facilities during weekends. **Has improved and ongoing.**
- ↻ Solicit ideas and counsel on a plan for facility debt reduction. **Ongoing priority.**