

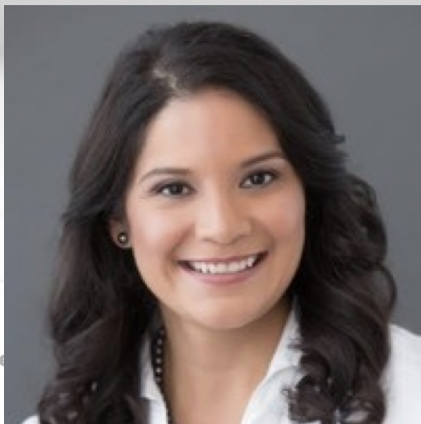
FOUNDATION 101

PRESENTED BY ERICA EKWURZEL, CFRE & MAYA BETHANY

TEFN Connect Webinar and Interactive Learning Series – June 17, 2021



**Maya Bethany, Founder
1 in 3 Foundation**



**Erica Ekwurzel, CFRE, MPAff
CivicAIM**

June

Hosted by

FOUNDATION
Innovation

Register at tefn.org/tefn-events



What is an education foundation?

- Public charitable nonprofit organization
- Tax exempt charity
- IRS governed as a 501(C)(3)
- Solely benefits a school district
- Independent from school district
- Governed by a volunteer board of directors



What are the benefits?

- School District
 - Increase Funding and Promotes Positive Image
- Superintendent
 - Community Support and Communication
- Faculty
 - Sparks Innovation and Increase Morale
- Community
 - Positive Awareness, Involvement and Engagement
- Students
 - New Programs and Enhanced Learning



Best Practices

- Plan for transparency, credibility and sustainability
- Methodically driven processes
- Granting organization with established criteria
- Measurable outcomes and accountability
- Diverse board of directors
- Independent of yet collaborative with school district



Best Practices

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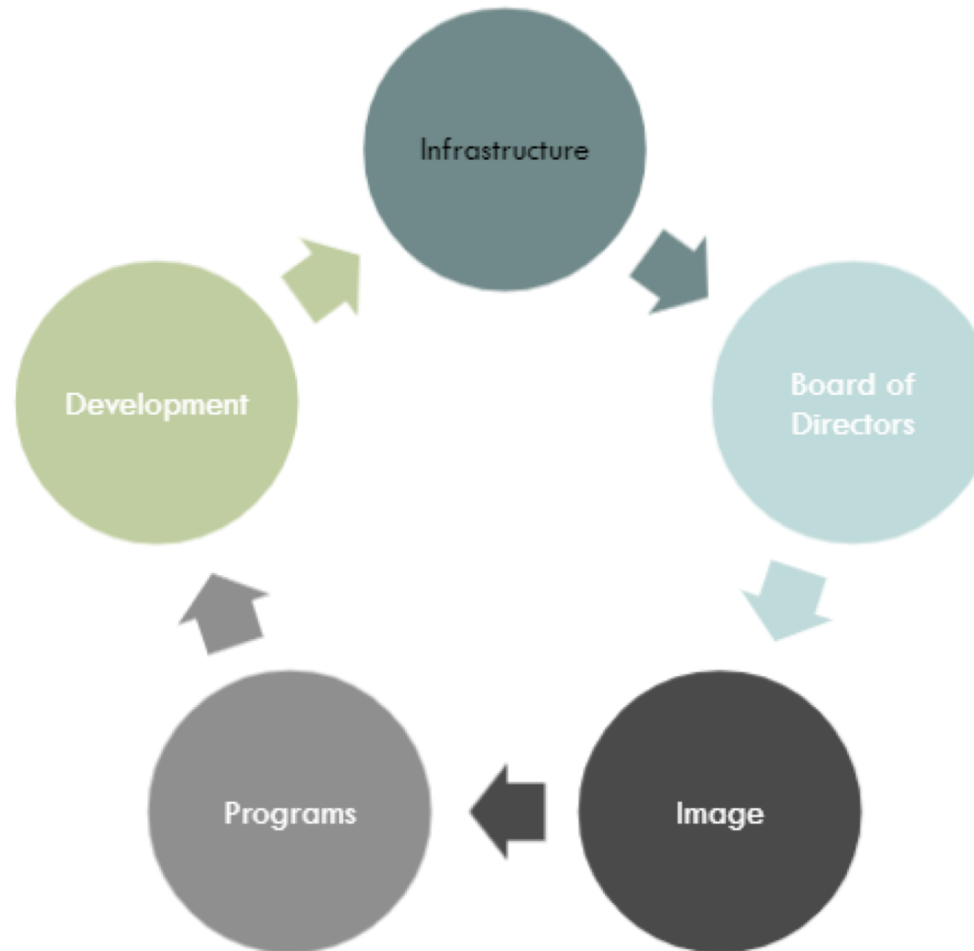


Impact of Education Foundation

- Community outreach
- Community engagement and representation
- Vehicle of collaboration
- Resource provider
- Indirect change agent
- Accountability to donor
- Fiscal agent
- Every student-every campus



Key Components



Interconnected components are necessary to ensure success.

**Choose your own training
adventure!**



Infrastructure

- Legal Corporation
- Bylaws
- Organizational Structure
- Charitable Organization – Section 501(c)(3)
- Memorandum of Understanding



State & Federal Documentation

- Secretary of State (Corporation Division) – Articles of Incorporation
- Federal Employer Identification Number
- IRS Application 1023 (501(c)(3) status)
- Tax Filing Form 990



Memorandum of Understanding

- Legal Contract - School District and Foundation
- Individually List the Obligations - School District and Foundation
- Public Funds Expended – What is the Return?



Board of Directors

- Roles & Responsibilities
- Identification
- Recruitment
- Training



Organizational Structure

GENDER		RACE/ETHNICITY		SKILL/EXPERTISE		NETWORKS		GEOGRAPHIC AREA	
	Other								
	West								
	East								
	South								
	North								
	Other								
	Public/Private Foundations								
	Business/Corp Relationships								
	Senior Citizens								
	Parents								
	School District Vendors								
	Elected Officials								
	Community Leaders								
	Other								
	Grant Writing								
Event Planning									
Public Relations/Marketing									
Fundraising									
Legal									
Leadership									
Administrator									
Financial/Accountant									
Other									
Native American									
Hispanic/Latino									
Asian/Pacific Islander									
Black									
Caucasian									
Male									
Female									
Years on Board									

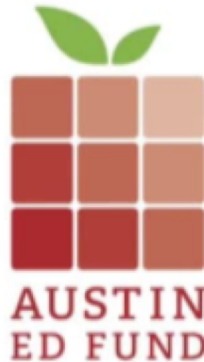
Image & Marketing

- Brand – Logo
- Marketing Materials
- Media & Message
- Social Media



Logo Development Examples

Connection–Keep the District in Mind



Branding Trends & Best Practices

- Diverse and Comprehensive Marketing Plan
- Mobile Optimization
- Social Media
- Money Given – Project Funded – Impact Made (MPI)
- Content Marketing



Social Media

SOCIAL MEDIA

A large percentage of younger donors use social media to **promote** causes. However, smaller percentages across all generations actively **follow** a cause on social media.



	LIKE PROMOTING ORGS ON SOCIAL MEDIA	FOLLOW A CAUSE OR CHARITY ON SOCIAL MEDIA
	2018	2018
Gen Z	51 %	27%
Millennials	46%	23%
Gen X	35%	20%
Boomers	21%	9%
Matures	12%	5%

Source: Blackbaud, The Next Generation of American Giving (2018)

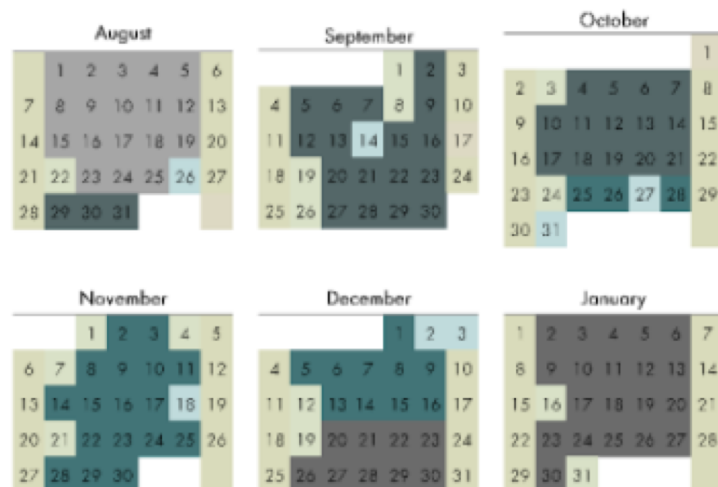


MARKETING PLANNER – ANNUAL CAMPAIGN

Project/Event Name: *Annual Campaign*
 Organizer's Name: *Ultimate Education Foundation*

PROJECT PHASE	STARTING	ENDING
Phase 1 – Image/Theme Development	08/1/16	08/26/16
Phase 2 – Silent Phase Kick Off Event Planning	08/29/16	10/21/16
Checkpoints Phase 2	9/1/16	10/26/16
Finalize Annual Campaign Marketing Materials		9/1/16
Mailing to Prospective Major Donors		9/8/16
Finalize Kick Off Event Plans: Mail Invitations/Flyers		9/26/16
Press Releases Notify Media about Kick Off	8/22; 9/19; 10/3	
Events/Promotional Opportunities	8/26; 9/14; 9/24; 9/28	
Phase 3 – Launch	10/24/16	12/16/16
Checkpoints Phase 2	10/24/16	12/12/16
KICK OFF COOK OUT Other Events/Promotional	10/27/16	
Letters to all prospective donors	11/4/16 draft	11/7/16
Personalized Thank you Letters From Kick Off	11/1/2016	11/7/2016
Press Releases	10/24; 11/1; 11/21; 12/12	
Phase 4 – Close and Assess	12/19/16	1/31/17
Media Opportunity announcing Campaign Results	1/16/2017	
Additional Campaign Thank You Letters	1/19/17	1/31/17
Press Releases	12/19/16; 1/16/17	

2016 - 2017



Promotional Opportunities

Events

- August 26 – Ultimate ISD Convocation
- September 14 – Ultimate ISD Open House
- September 24 – Chamber of Commerce Hometown Festival
- September 28 – Collaborative Meeting with Local Real Estate Agents
- October 27 – High School Football Season Opener Cook Out – Kick Off Event
- October 31 – Police Department Fall Festival
- November 18 – Ultimate ISD Homecoming
- December 2-3 – Ultimate Activities Center Hometown Holidays Show

Evaluation – Overall Celebration; Awareness; Increased Involvement; New Donors

FOUNDATION
Innovation
 inspiring communities to engage in public education



Programs

- District Needs
- Establish Credible and Fair Process
- Teacher Grants
- Academic Recognition
- Assessment

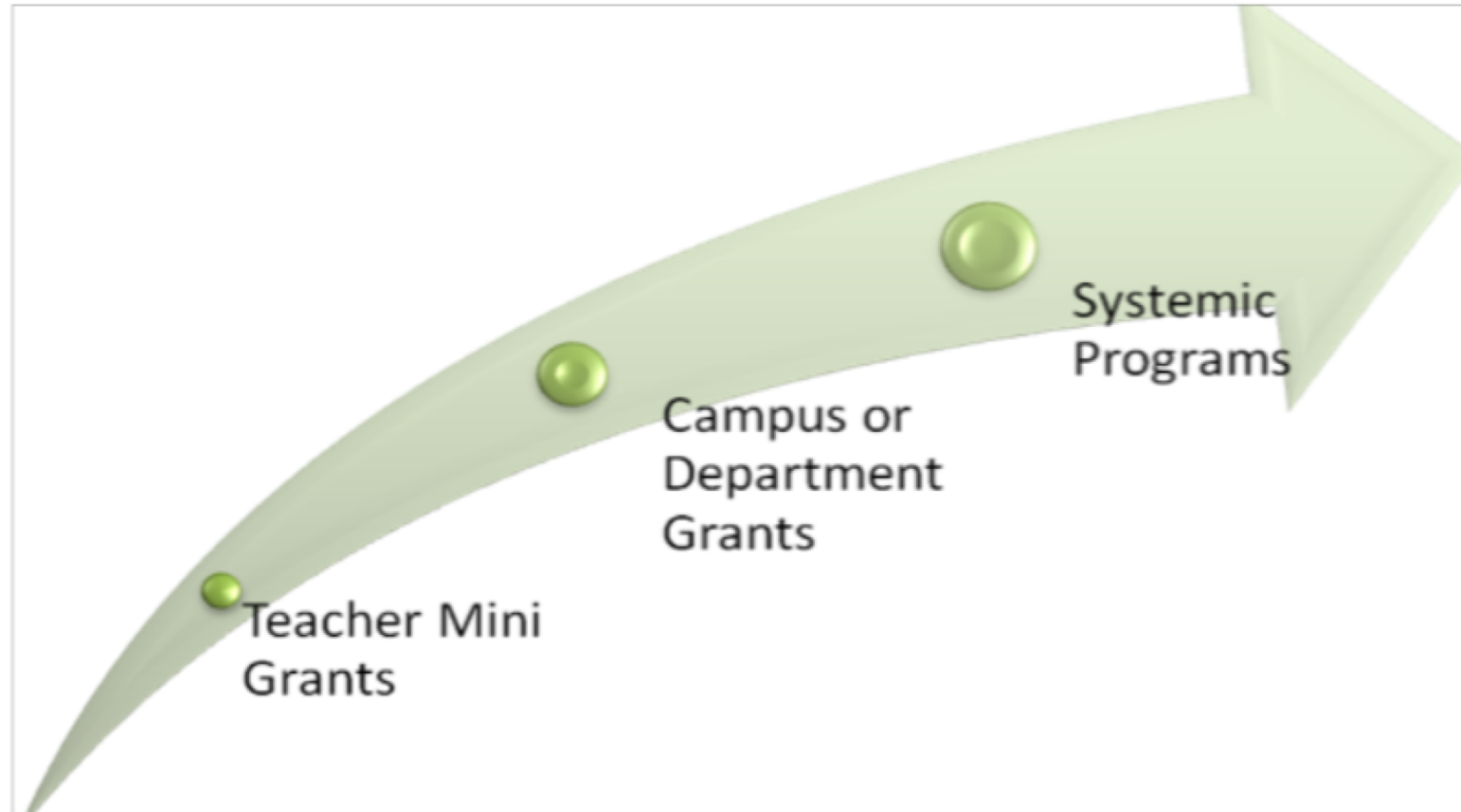


Grants

- Innovative initiatives
- Funds into the classroom
- Systemic grants
- Application on-line
- Grant review committee
- Blind review
- Prize party
- Assessment and outcomes



Life Cycle of Grants



Academic Achievement

- Event to celebrate academic achievement and teaching excellence
- Recognize students
- Honor teachers
- Teachers of the Year



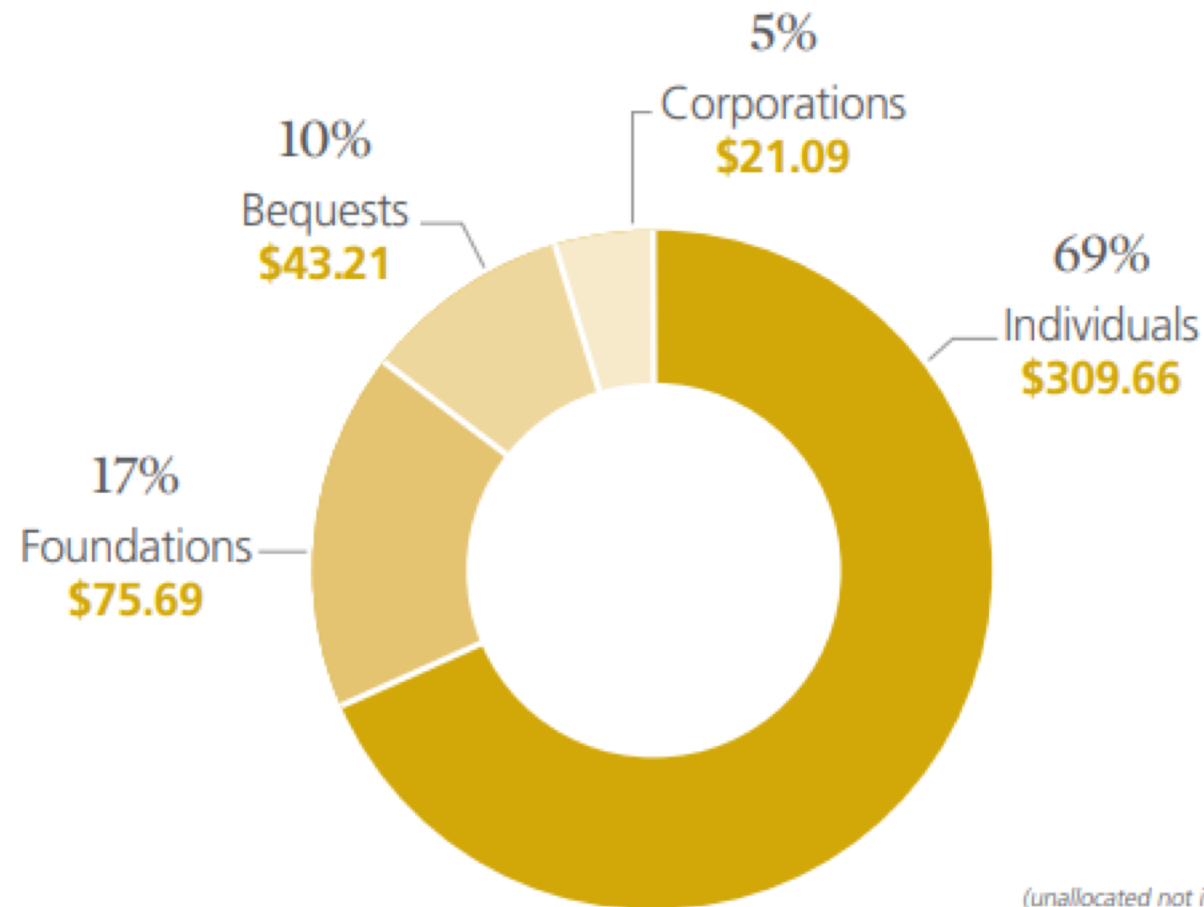
Development (Fundraising)

- K12 Philanthropy
- Database
- Methodical Plan/Campaign
- Stewardship



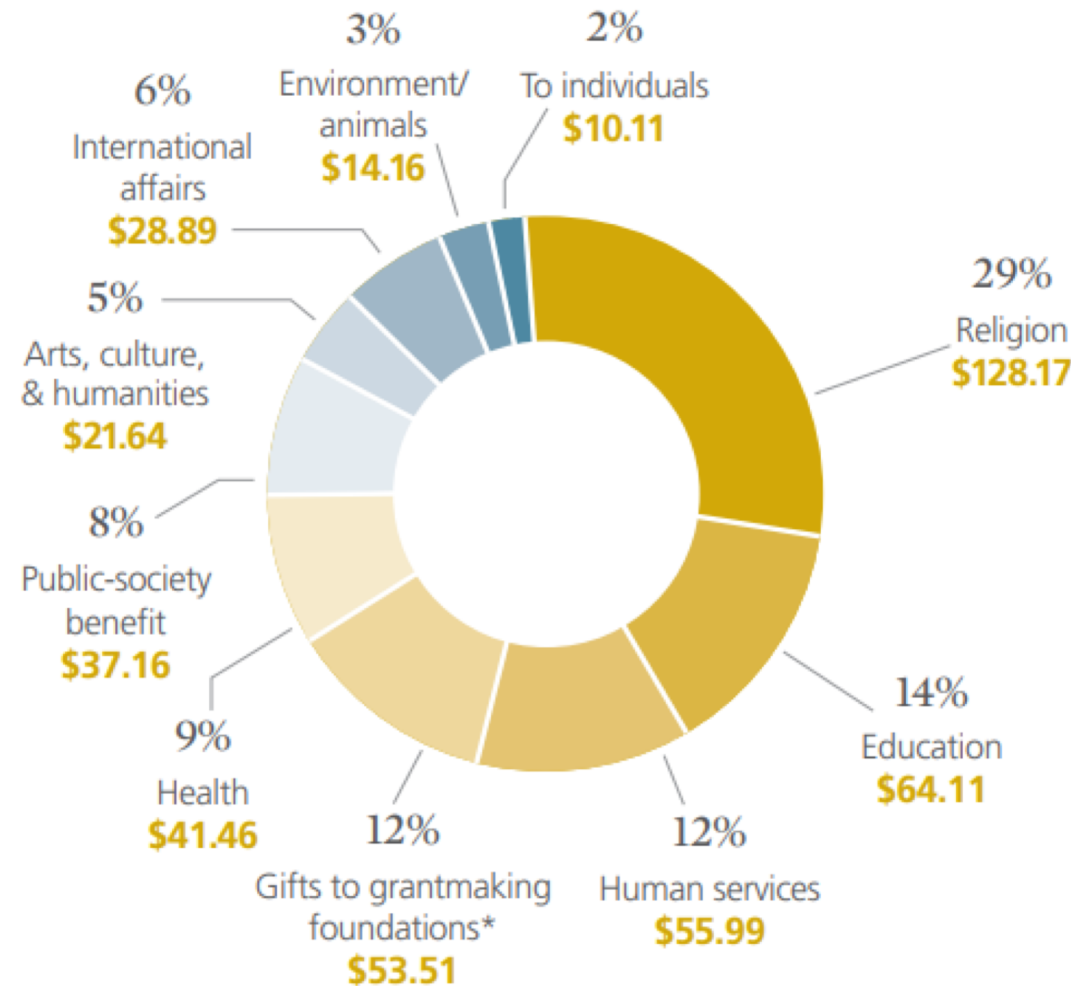
2019 contributions: \$449.64 billion by source of contributions

(in billions of dollars – all figures are rounded)



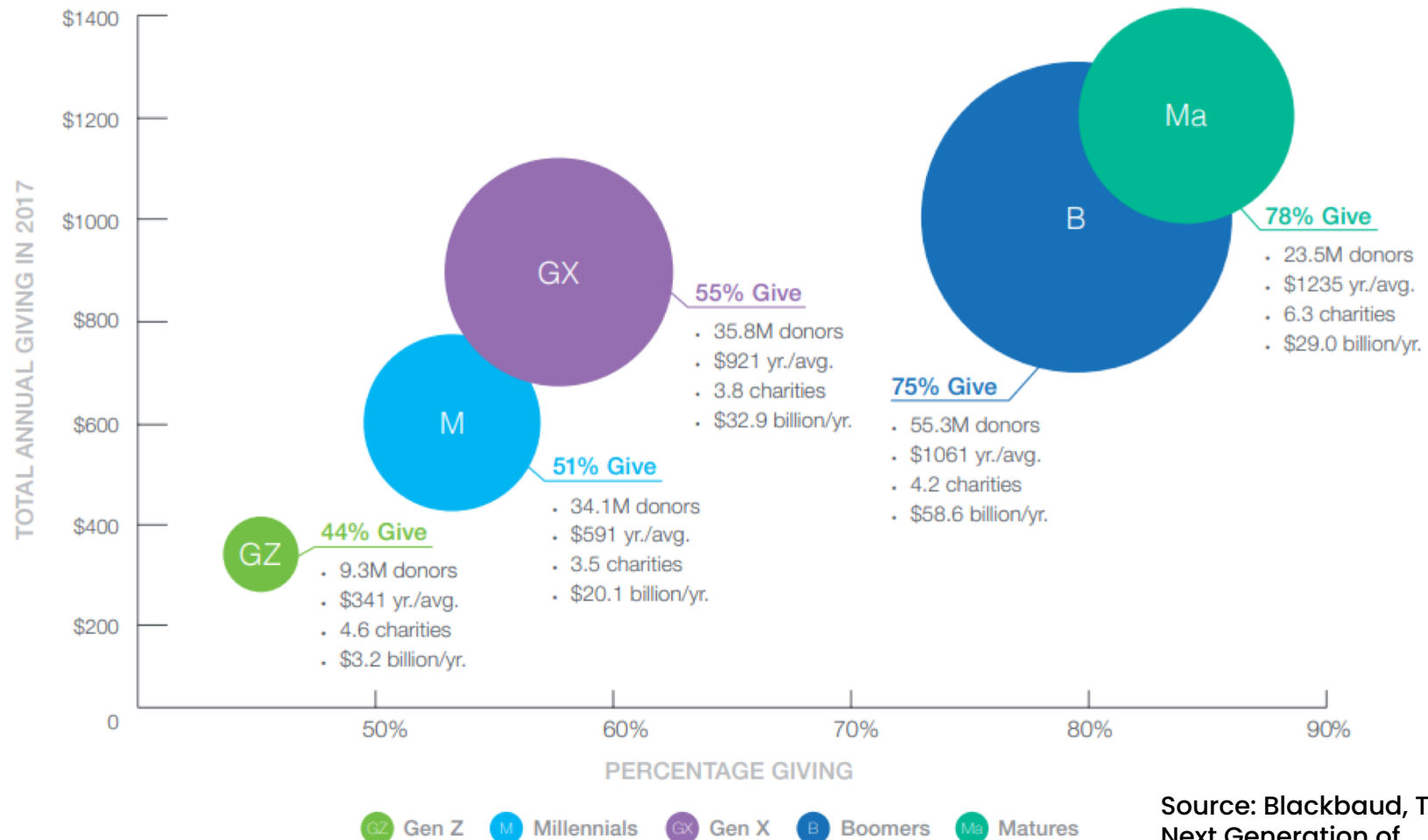
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* Estimate developed jointly by Candid (formerly Foundation Center) and Giving USA

Generational Giving



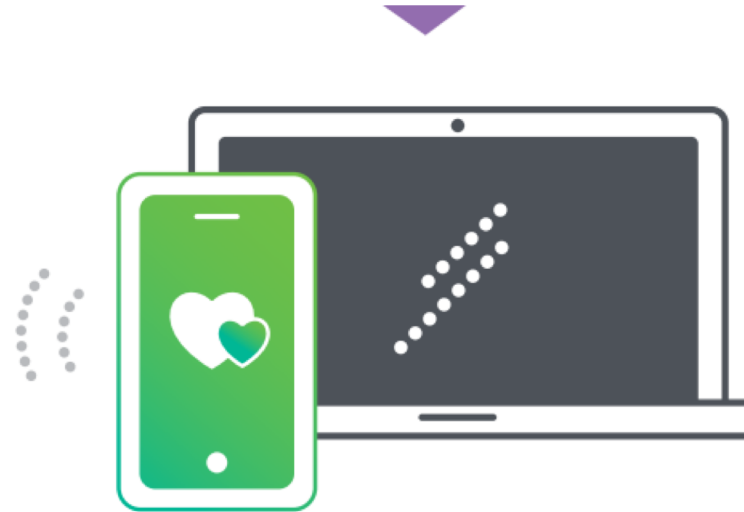
Source: Blackbaud, The Next Generation of American Giving (2018)



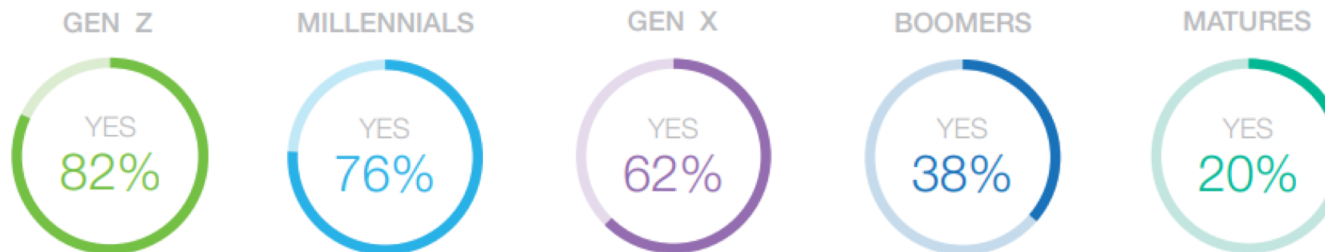
Mobile Giving

MOBILE GIVING

Today, mobile giving is more like website giving. Texting can be useful for episodic giving, but **more donors use their mobile for a seamless online experience**—to read emails, visit websites, interact on social, and more—just like they would on their desktop.



PERCENTAGE OF GENERATIONAL DONORS WILLING TO GIVE VIA MOBILE DEVICE



Source: Blackbaud, The Next Generation of American Giving (2018)





Thank you for attending!

Maya Bethany

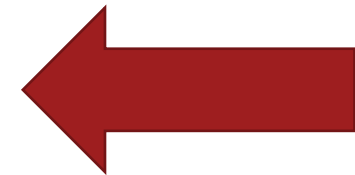
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