



Alamo Heights Video



EDUCATION FOUNDATION fish camp

Presented by:

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What is an Education Foundation?

- ❑ Public charitable nonprofit organization
- ❑ Tax exempt charity
- ❑ IRS governed as a 501(C)(3)
- ❑ Solely benefits a school district (complements ISD SP)
- ❑ 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

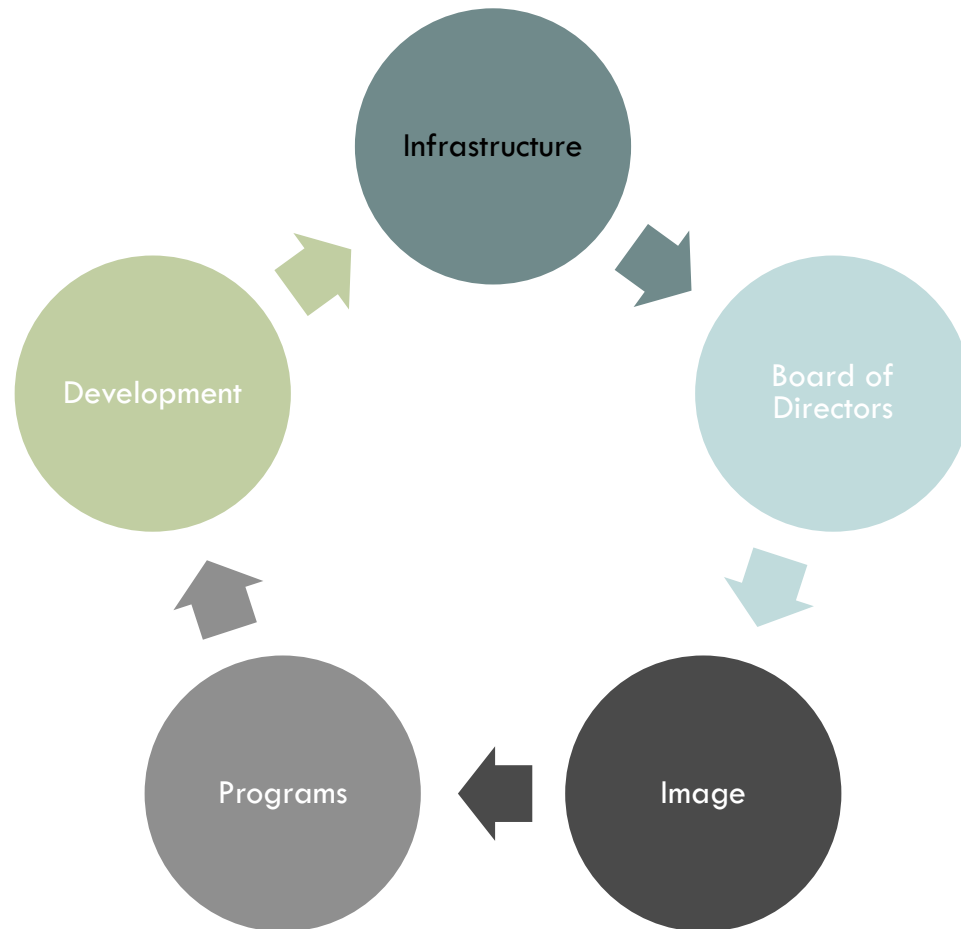
- ❑ Plan for transparency, credibility and sustainability
- ❑ Methodically driven processes
- ❑ Granting organization with established criteria
- ❑ Measurable outcomes and accountability
- ❑ Diverse board of directors
- ❑ Independent of yet collaborative with school district

Impact of an 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.



Infrastructure

Legal Corporation

Bylaws

Organizational Structure

Charitable Organization – Section 501(c)(3)

Memorandum of Understanding

State & Federal Documentation

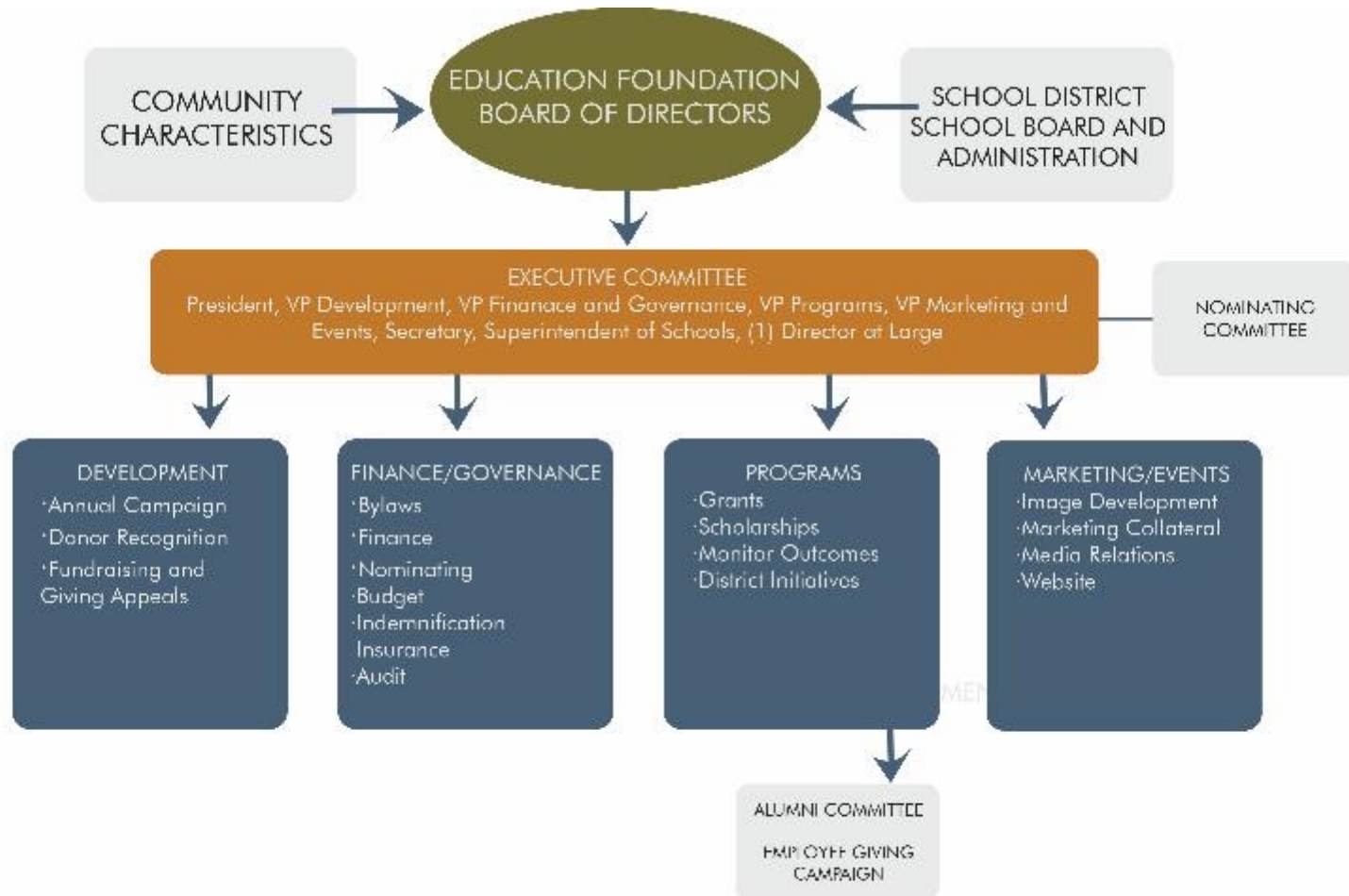
- Secretary of State (Corporation Division) –Articles of Incorporation (aka: Certification of Formation)
- Federal Employer Identification Number
- IRS Application 1023 (501(c)(3) status)
- Tax Filing Form 990

Organizational Structure

- ❑ Board of Directors
- ❑ Officer and Committee Structure
- ❑ Size of the Board



Recommended Organizational Framework



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

Roles and Responsibilities

- ❑ School Board Trustees
- ❑ School District and Employees
- ❑ Foundation and Board of Directors
- ❑ Officers
- ❑ Committees



| 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 | | | | | | |
| Board Member | | | | | | |

Prospective Board Members

- Board Member Expectations
 - Attend Meetings
 - Participate on a Committee
 - Contribute and Promote
 - Leverage Donor Opportunities

Recruitment & Training

- Systematic
- Strategic
- Orientation

Image & Marketing

Brand – Logo

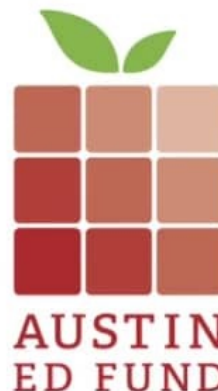
Marketing Materials

Media & Message

Social Media

Logo Development Examples

- Connection – Keep district in mind



Image/Branding – Logo Development



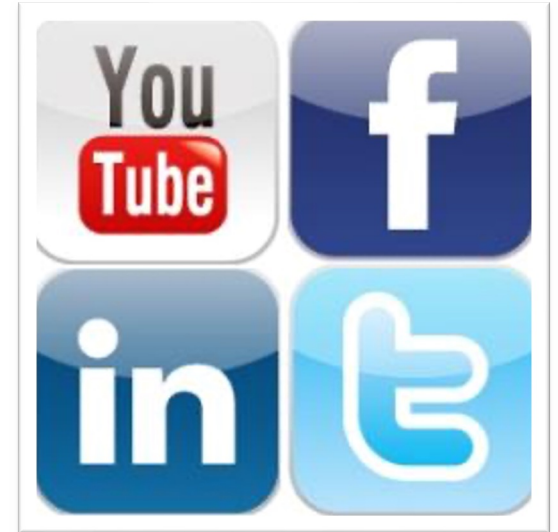
Brochures

- If tri-fold, unique size
- If you have a video, combine with brochure
- Examples



Branding Trends and Best Practices

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



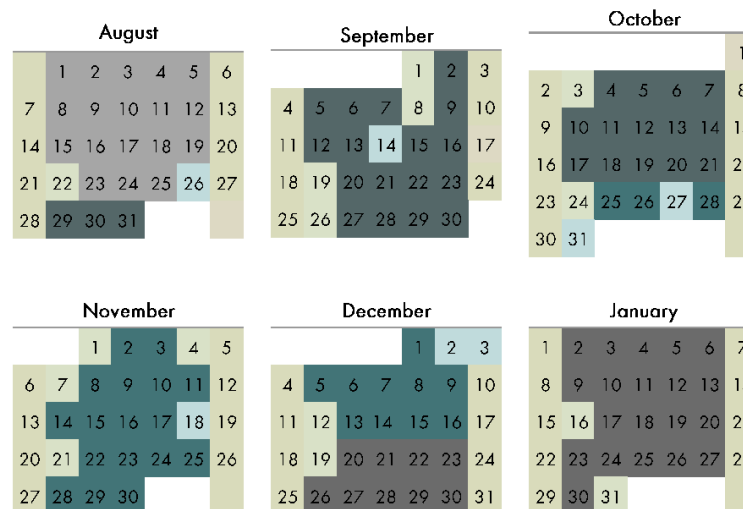
MARKETING PLANNER – ANNUAL CAMPAIGN

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 | 8/22; 9/19; 10/3 | |
| Notify Media about Kick Off | 8/26; 9/14; 9/24; 9/28 | |
| Events/Promotion Opportunities | | |
| Phase 3 – Launch | 10/24/16 | 12/16/16 |
| Checkpoints Phase 2 | 10/24/16 | 12/12/16 |
| KICK OFF COOK OUT | 10/27/16 | |
| Other Events/Promotional | | |
| 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

Events

- ❑ Build awareness
- ❑ Opportunity to brand
- ❑ Brand throughout
- ❑ Even decorations



C & B SEEN CORSICANA EDUCATION FOUNDATION
BRAZILIAN around
Saturday, October 3, 2015

Name _____
Phone _____
Address _____ Zip _____
City/State _____
Email _____
Enclosed is my check for \$ _____ (Payable to CEF)
☐ I like to buy a table of 8 (\$1,000)
☐ I accept this donation.

Visa _____ MasterCard _____
3 Digit Code _____
by September 18, 2015
ns or to inquire at
(903) 602-8135
your records.
D 473-16282
n charitable

BRAZILIAN around
6 p.m.
Silent Auction
DJ Khyrik & Hors d'oeuvres
7 p.m.
Welcome & Invocation
Dinner

CORSICANA EDUCATION FOUNDATION
C & B SEEN
CORSICANA EDUCATION FOUNDATION
2015 GALA

C & B SEEN CORSICANA EDUCATION FOUNDATION
BRAZILIAN around
Saturday, October 3, 2015
6 p.m. - 10:00 p.m. Event Center
Featuring: Gourmet Dinner, Dessert Bar, Open Bar, Silent Auction, Music & Special Entertainment
Tickets \$75 each. Table sponsorship available.
www.corsicanaeducation.org

#Socionomics



Programs

District Needs

Establish Credible and Fair Process

Teacher Grants

Academic Recognition

Assessment

Grants

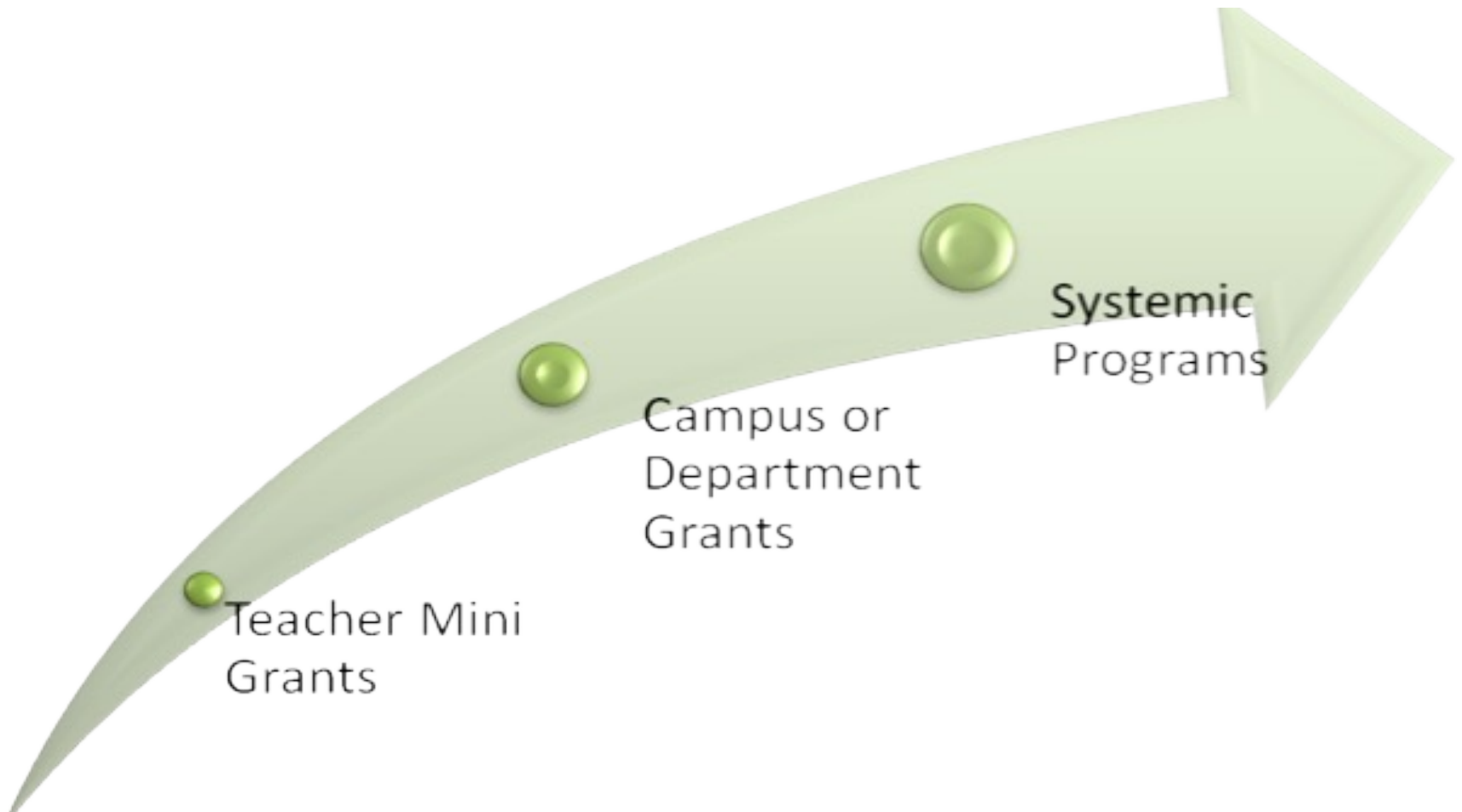
- Innovative initiatives
- Funds into the classroom
- Systemic grants
- Application on-line
- Grant review committee
- Blind review
- Prize party
- Assessment and outcomes





Somerset Grant Awards
Video

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

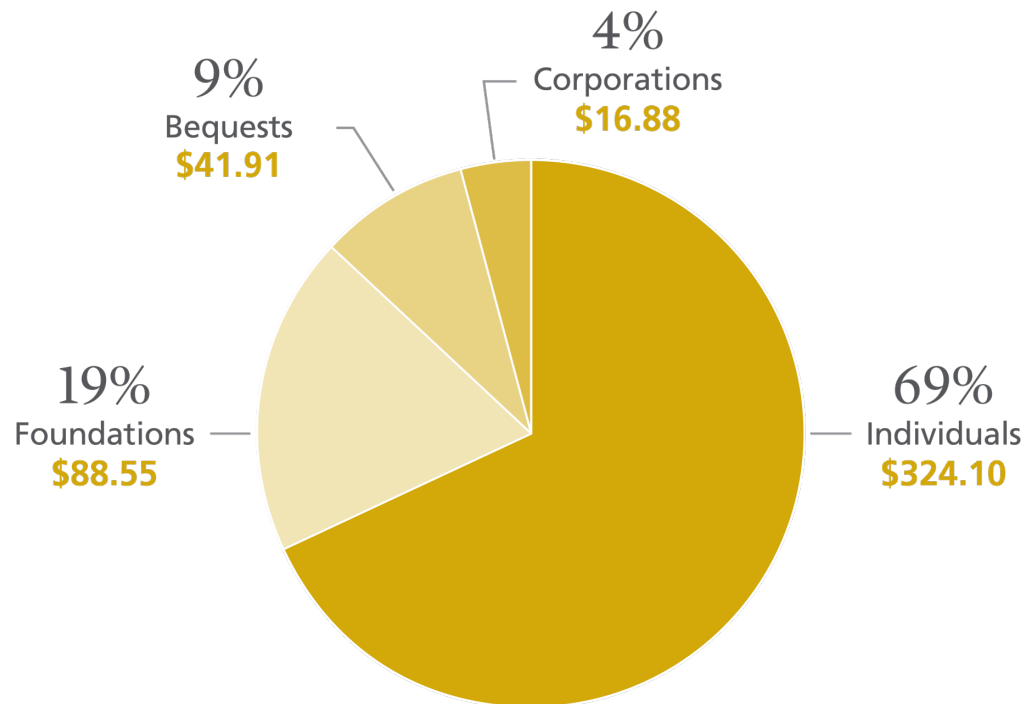
Methodical Plan/Campaign

Stewardship



2020 contributions: \$471.44 billion by source of contributions

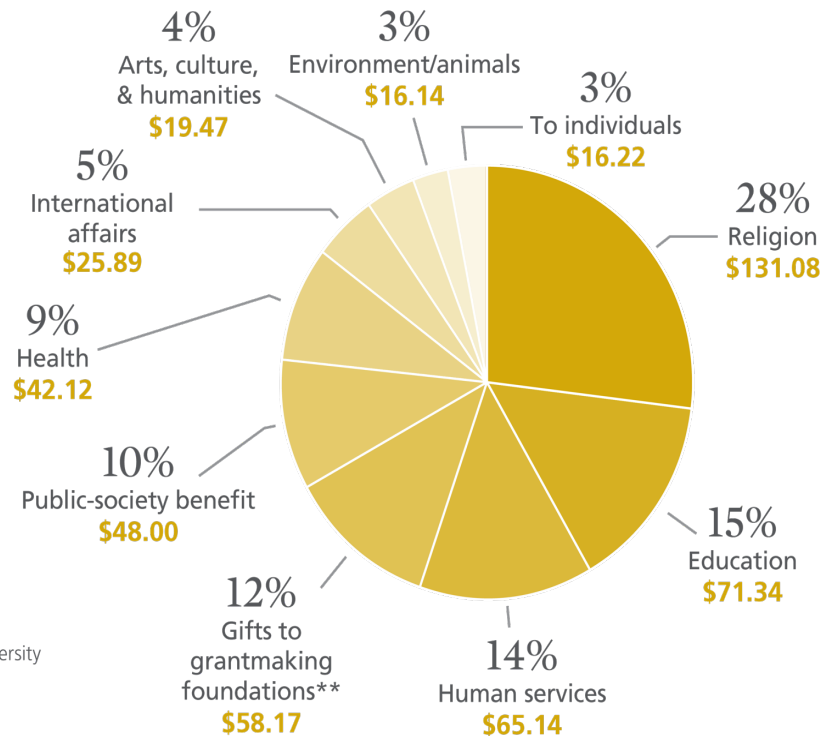
(in billions of dollars - all figures are rounded)





2020 contributions: \$471.44 billion by type of recipient organization*

(in billions of dollars - all figures are rounded)



* Total includes unallocated giving, which totaled -\$22.13 billion in 2020.

** Estimates developed by the Indiana University Lilly Family School of Philanthropy using data provided by Candid.

Additional Take Aways

- Giving was up 9% in 2021 (Blackbaud)
- March and December were the highest giving months for K-12 Education – 15.5% & 20.1%
- Online donations account for 12% – 28% from mobile devices

Additional Philanthropic Opportunities

- ❑ Estimate 2016-2060 = \$41 trillion wealth transfer
- ❑ Women are expected to inherit 70% of the \$41 trillion
- ❑ Women control more than 1/2 of the private wealth in US
- ❑ By 2025, women will comprise 60% of billionaires
- ❑ Importance of relationship with trust officers, estate attorneys,
and wealth managers

Questions?

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inspiring communities to engage in public education

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