KEY COMPONENTS FOR SUCCESSFUL AND SUSTAINABLE CHARITIES

FOUNDATION INNOVATION, LLC
MAYA BETHANY
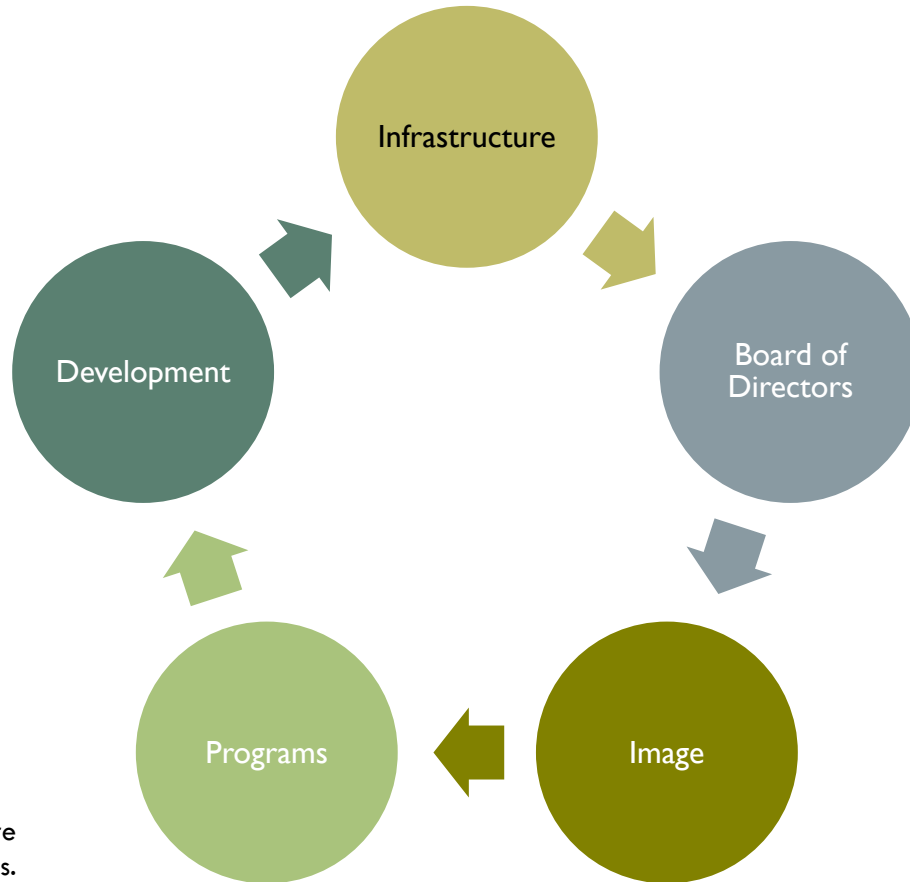

FOUNDATION *Innovation*

inspiring communities to engage in public education

www.foundationinnovation.com
512.535.2046

MENTI

- What is your biggest challenge with your organization

- What is your WHY?

Infrastructure

Board of Directors

Image

Programs

Development

Interconnected components are necessary to ensure success.

KEY COMPONENTS

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

INFRASTRUCTURE

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

Documents to Disclose

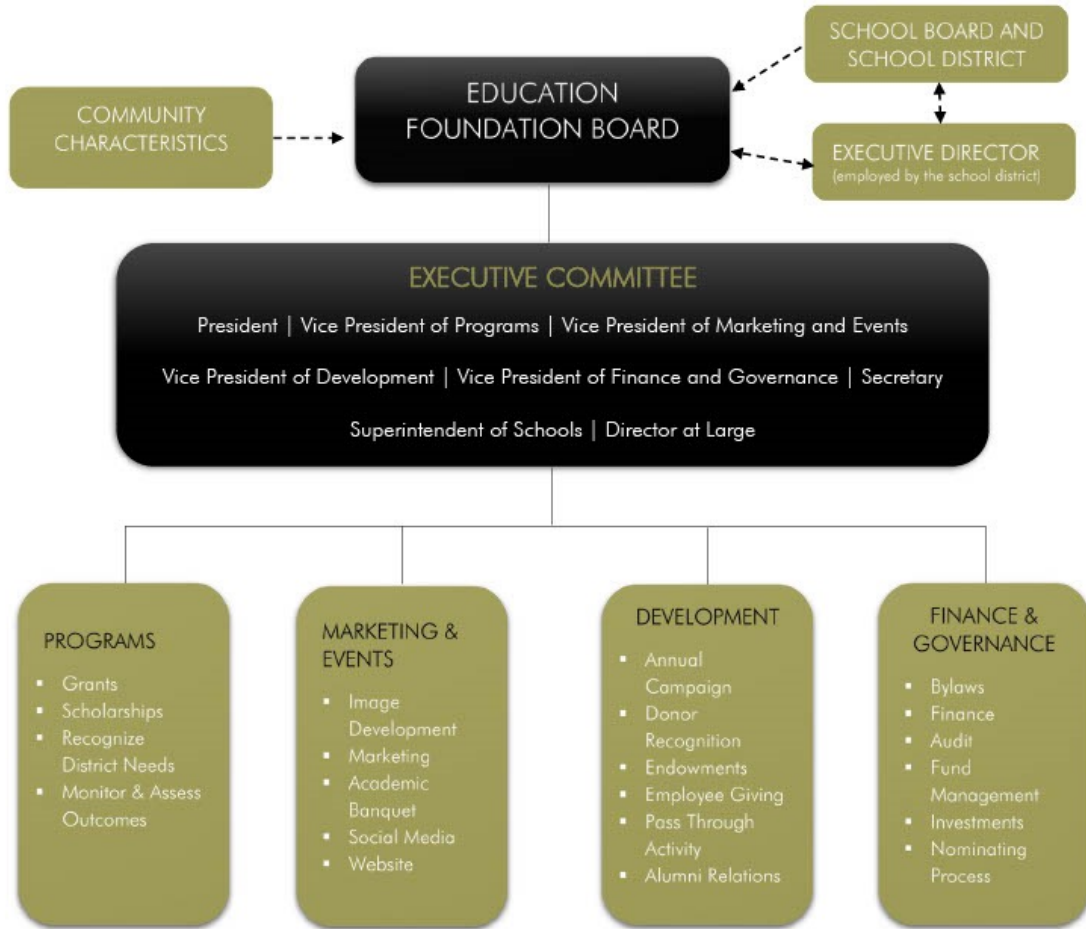Board of Directors

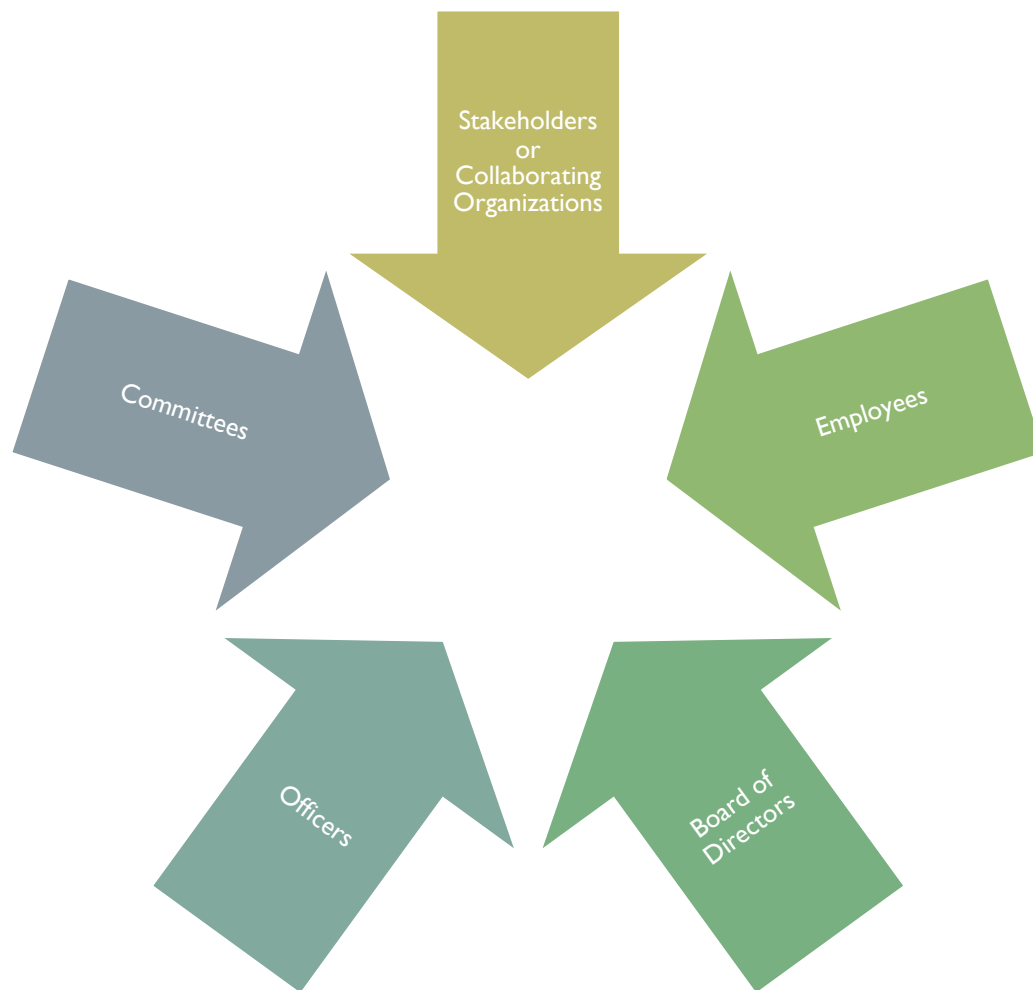Officer and Committee Structure

Size of the Board

Meetings

BOARD OF DIRECTORS

ULTIMATE EDUCATION FOUNDATION

ORGANIZATIONAL FRAMEWORK

COMMUNITY CHARACTERISTICS

EDUCATION FOUNDATION BOARD

SCHOOL BOARD AND SCHOOL DISTRICT

EXECUTIVE DIRECTOR
(employed by the school district)

EXECUTIVE COMMITTEE

President | Vice President of Programs | Vice President of Marketing and Events

Vice President of Development | Vice President of Finance and Governance | Secretary

Superintendent of Schools | Director at Large

PROGRAMS
- Grants
- Scholarships
- Recognize District Needs
- Monitor & Assess Outcomes

MARKETING & EVENTS
- Image Development
- Marketing
- Academic Banquet
- Social Media
- Website

DEVELOPMENT
- Annual Campaign
- Donor Recognition
- Endowments
- Employee Giving
- Pass Through Activity
- Alumni Relations

FINANCE & GOVERNANCE
- Bylaws
- Finance
- Audit
- Fund Management
- Investments
- Nominating Process

RECOMMENDED ORGANIZATIONAL FRAMEWORK

ROLES AND RESPONSIBILITIES

Stakeholders or Collaborating Organizations

Committees

Employees

Officers

Board of Directors

Board Member Expectations

Attend Meetings

Participate on a Committee

Contribute and Promote

Leverage Donor Opportunities

RECRUITING PROSPECTIVE BOARD MEMBERS

IDENTIFICATION

Sample Board Matrix

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

Identification

Recruitment

Training

ONBOARDING

Brand – Logo

Marketing Materials

Media & Message

Social Media

IMAGE & MARKETING

IMAGE/BRANDING – LOGO DEVELOPMENT

- Develop Funding Priorities and Initiatives

- What are the Expected Outcomes

- Develop Talking Points

- Evaluation and Assessment

- Reporting to Donor

PROGRAMS AND FUNDING INITIATIVES

Methodical and diversified Plan/Campaign

K12 Philanthropy

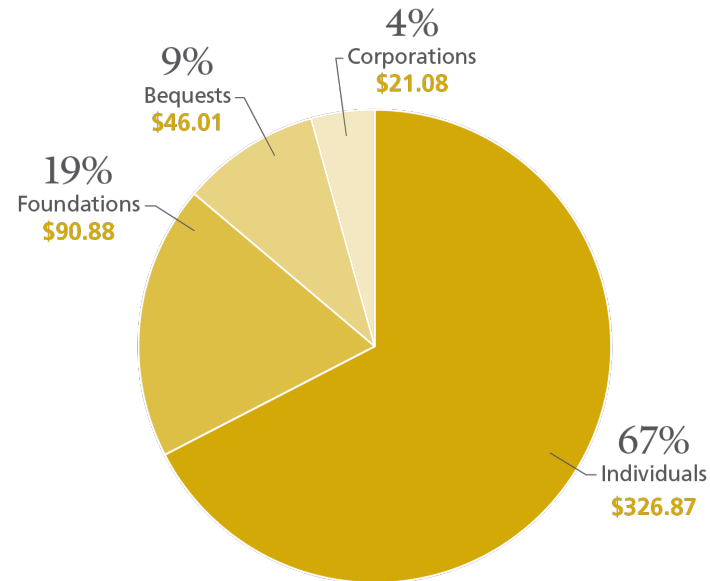Higher education advancement techniques

Friendraising
Stewardship

DEVELOPMENT (FUNDRAISING)

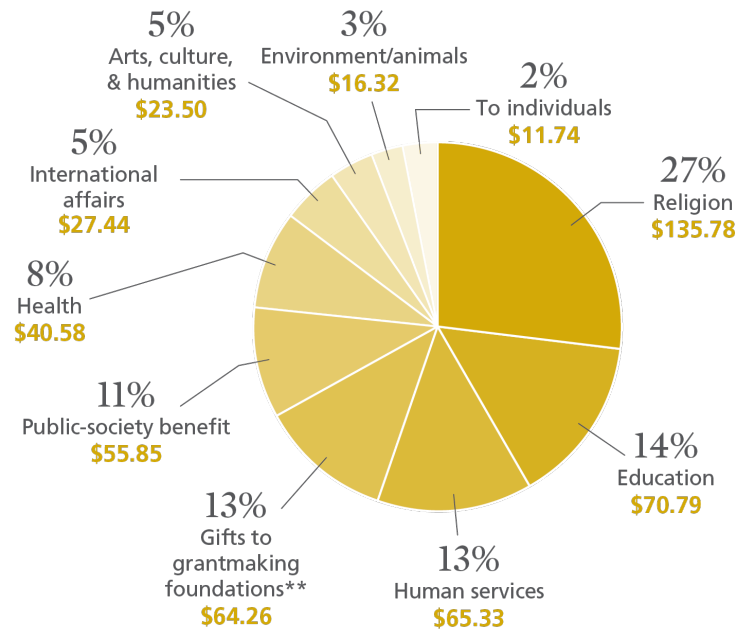# 2021 contributions: $484.85 billion by source of contributions

(in billions for dollars – all figures are rounded)

4%
Corporations
$21.08

9%
Bequests
$46.01

19%
Foundations
$90.88

67%
Individuals
$326.87

2021 contributions: $484.85 billion by type of recipient organization*

(in billions for dollars – all figures are rounded)

5%
Arts, culture,
& humanities
$23.50

3%
Environment/animals
$16.32

2%
To individuals
$11.74

5%
International
affairs
$27.44

27%
Religion
$135.78

8%
Health
$40.58

11%
Public-society benefit
$55.85

13%
Gifts to
grantmaking
foundations**
$64.26

13%
Human services
$65.33

14%
Education
$70.79

* Total includes unallocated giving,
which totaled -$26.75 billion in 2021.

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

PHILANTHROPY DATA

1.8 Million nonprofit organizations

Wealth transfer from baby boomer population will be $30 - $68 trillion dollars

Millennials will be five times richer

Project based giving – solving problems

45% of worldwide donors give on a monthly basis

41% of worldwide donors gave to a disaster or crisis

BASIC STEPS

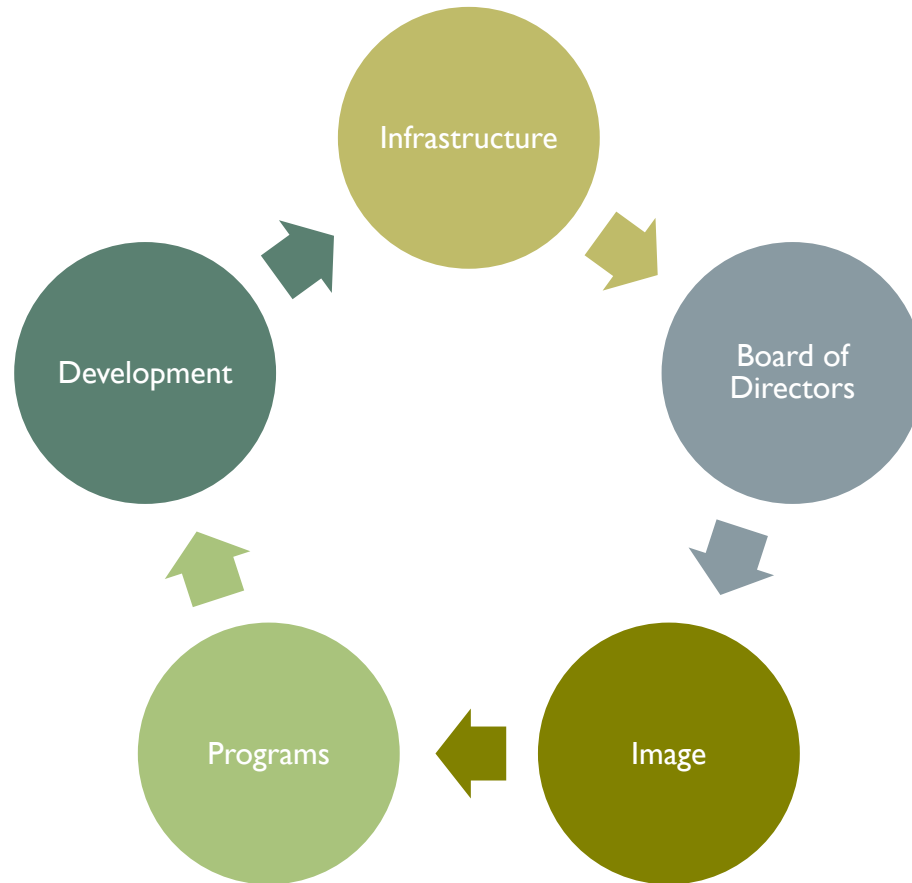|	
Identification	
Assessment	
Cultivation	
Solicitation	
Stewardship	

BUILDING RELATIONSHIPS

Prospect

Donor

Repeat Donor

Major Gift

Planned Gift

KEY COMPONENTS

QUESTIONS?

Foundation Innovation, LLC
information@foundationinnovation.com

For more information about our firm and the
services and resources we provide, please visit
www.foundationinnovation.com

FOUNDATION *Innovation*
inspiring communities to engage in public education