



Welcome to the 2025 TEFN Annual Conference!

Texas Education Foundation Network (TEFN) was created to support local school education foundations in Texas by providing networking opportunities, sharing of best practices, and training & resources needed for foundations to be successful. TEFN is a program of Texas Pioneer Foundation, a private, independent foundation established to support outstanding and innovative educational programs and projects in Texas.

It's been 16 years since the first meeting of school foundations in Texas. In 2009, a group of 35 Texas Pioneer Foundation grantees gathered together to share their experiences. During that first meeting, we found there was a strong desire to create networking opportunities and training for school foundations in Texas.

As a result, we formed a conference committee from various school foundations across the state who developed the first annual conference the following year in 2010. There were 89 attendees for the first conference. Thanks to your support, the network and the conference have grown considerably. We are expecting over 250 attendees this year representing executive directors, board members and staff from over 115 school foundations in Texas.

This year's conference will feature non-profit consultants, executive directors and professional speakers presenting over 40 breakout and general sessions. In addition, we are excited to include the Awards Showcase again this year to give you another opportunity to connect, learn and share with your peers.

We are excited to see everyone again and thank you for joining us!



Fred Markham
President & CEO
Texas Pioneer Foundation



Michelle Coburn
Executive Director
Texas Pioneer Foundation



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The Texas Education Foundation Network is a program of the Texas Pioneer Foundation.

The Texas Education Foundation Network (TEFN) was launched in 2012 as a program of the Texas Pioneer Foundation and was created to support local education foundations in Texas by providing networking opportunities, sharing of best practices and providing training and resources needed for foundations to be successful. The Texas Pioneer Foundation is a private independent foundation established to support outstanding and innovative educational programs and projects in Texas.



2025 TEFN Conference Committee



Allison Brubaker
Austin Ed Fund



Kim Crumrine
Royse City ISD
Education Foundation



Lexie Greathouse
Judson ISD Education
Foundation



Deanna Jackson
SCUC ISD Education
Foundation



Arin Lane
Gainesville ISD
Education Foundation



Heather McFarland
Alamo Heights School
Foundation



Linda Medina-Lopez
Pflugerville Education
Foundation



Jillian Nash
Seguin Education
Foundation



Samantha Ruiz
Southwest Education
Foundation



Ally Surface
Eagle Mountain
Saginaw ISD Education
Foundation



Geny White
Texas City ISD
Foundation for the
Future



Erin Windham
Nacogdoches ISD
Education Foundation



TEFN Advisory Council



Karen Anderson
Red Oak ISD Education
Foundation



Shawn Callaway
Foundation
Innovation LLC



Valerie Foster
Sanger Education
Foundation



Judy Geelhoed
SAISD Foundation



Randy Lewallyn
Mesquite ISD
Education Foundation



Suzi Pagel
Foundation
Innovation LLC



Conference Overview

Wednesday, April 09 Schedule

12:00 – 1:30	Opening Lunch Program
1:45 – 3:00	Breakout Sessions
3:15 – 4:30	Breakout Sessions
5:15 – 6:30	Networking Reception & Award Showcase Exhibits
6:00 – 8:00	Dinner Buffet

Thursday, April 10 Schedule

8:00 – 8:45	Breakfast Networking Activity
9:00 – 10:15	Breakout Sessions
10:30 – 11:45	Breakout Sessions
12:00 – 1:30	Luncheon & Achievement Award Presentations
1:45 – 3:00	Breakout Sessions
3:15 – 4:30	Breakout Sessions
5:00 – 7:00	Networking Reception & Dinner Buffet

Friday, April 11 Schedule

7:30 – 8:00	Breakfast Grab & Go
8:00 – 9:15	Breakout Sessions
9:30 – 10:45	Breakout Sessions
11:00 – 11:45	General Session

Special Thanks To

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PHOTOGRAPHY

2025 Conference Graphics Team



**Maya Golden
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RISD PRINT SERVICES



Wednesday, April 9 Schedule

10:00 - 12:00 Conference Check-in

Baron's Ballroom Foyer

12:00 - 1:30 Opening Lunch Program

Baron's Ballroom

Welcome & Introductions

Fred Markham, President & CEO - Texas Pioneer Foundation

Michelle Coburn, Executive Director - Texas Pioneer Foundation

Keynote Address - Back at Camp: The Journey We Choose

Pamela Benson Owens, CEO - Edge of Your Seat Consulting & TEFN Camp Director

During this interactive session we will gather as campers once again and welcome our new campers as well! This beautiful camp experience will explore what it means to be present, paced, peaceful, positive and passionate about the work we do and how we do it. Take off those backpacks and all that weighs you down and prepare for a unique camping experience among colleagues and friends.

1:45 - 3:00 Breakout Sessions

Session 1

Houston Room

FISH CAMP 101

Shawn Callaway, Chief Experience Officer & Owner - Foundation Innovation

Part 1 of 2: Are you or your foundation NEW to the world of advancement and philanthropy? Take this deep dive into the essential components and necessities of running a high-achieving and capacity-building foundation. This is the session tailor-made to all the "Freshman" in the Texas education foundation community! Attendees will learn about foundation infrastructure and board development components and how to structure foundation boards for maximum fundraising and community engagement.

Session 2

Robertson Leftwich Room

Mission Possible: Hosting an Event that Fuels Your Purpose

Kim Crumrine, Executive Director - Royse City ISD Education Foundation

In this session you will be guided through the essential steps of planning and executing a successful fundraising event. You will learn how to align your event with your organization's mission, engage key stakeholders, and implement creative strategies that maximize donor engagement and fundraising potential. The session will highlight how to stay mission focused, leverage storytelling, secure sponsorships, and gain community support to create an event that not only raises funds but also deepens connections with your cause. You will not want to miss this fun-filled party planning session! Participants will leave inspired and empowered to plan a successful fundraising event that aligns with their organization's mission. Participants will gain practical tools and strategies to create an engaging and memorable guest experience.

Session 3

Mina Room

How to Make Your Grant Program More Responsive to Teachers' Needs

Mary Flannigan, Finance & Programs Manager - San Antonio ISD Foundation

This session will take a deep dive into the variety of educator grants foundations are offering - from new teacher grants, mini-grants, more extensive/innovative grants, to whole school/principal grants. Methods of awarding grants will also be discussed from utilizing programs such as DonorsChoose from creating your own application system, and ways to help streamline this process to make it easy for educators. Learn how to adapt your own grant program to streamline and diversify opportunities to better meet the needs of your district's current environment. Session participants will gain insights on the benefits of having an educator grant program as well as ways to partner with external organizations to grow your program.



Wednesday, April 9 Schedule

Session 4

Milam Room

Employee Giving - Panel Discussion

Karen Anderson, Executive Director - Red Oak ISD Education Foundation

Lexie Greathouse, Director of Communications - Judson ISD & Judson Education Foundation

Geny White, Executive Director - Texas City ISD Foundation for the Future

Come learn from districts with successful Employee Giving programs. Explore different approaches to engage your district staff to promote your foundation as well provide financial support! Participants will leave with resources to implement an employee giving program or take their current program to the next level.

Session 5

Ranger Room

Monthly Giving Program: Diversify your Revenue

Coleen Brighton, Executive Director - Leander Educational Excellence Foundation

Are you only asking district staff to give each month? Or relying on one major corporate donor each year? This conversation will show the importance of diversifying your revenue streams. We'll talk about the ways a nonprofit can create longevity and success by having various revenue streams, with a focus on recurring revenue from monthly donors such as staff and the community.

Session 6

Austin Room

How to Market Your Foundation Like a Corporation

Crystal Scanio, President and CEO - Irving Schools Foundation

In this session, participants will discover how to leverage corporate marketing strategies to elevate their foundation's visibility and impact. Learn actionable techniques for branding, storytelling, and digital engagement that will help your foundation stand out and attract the support it deserves. Participants will be able to implement corporate-style marketing strategies to enhance their foundation's brand recognition and connect with a broader audience. Attendees will also gain the skills to craft compelling narratives and digital campaigns that increase donor engagement and long-term support for their foundation's mission.

3:15 - 4:30 Breakout Sessions

Session 1

Houston Room

FISH CAMP 102

Shawn Callaway, Chief Experience Officer & Owner - Foundation Innovation

Part 2 of 2: New foundations and those new to foundations will learn about government requirements, best practices in marketing and event management, programming and successful opportunities for capital building and developing foundations and boards into strong and thriving organizations. Attendees will take a deep dive into the importance of image and marketing, how to create strong programming opportunities that create maximum impact and how to create partnerships and ties with donors that grow your foundation's impact.

Session 2

Austin Room

Meaningful Board Engagement: Team Work Makes the Dream Work

Jerri Monbaron, Executive Director - Humble ISD Education Foundation

Christy Tarkington, Assistant Director - Humble ISD Education Foundation

An engaged board is a board that is in a collaborative partnership with the executive director. Join us as we share insights on what your board members are looking for to answer the call for engagement and best practices you can use to build trust and collaboration. Participants will learn how to build a collaborative relationship with their board members.



Wednesday, April 9 Schedule

Session 3

Mina Room

Graphic Design Basics: Understanding the Principles of Design & Crafting Impactful Newsletters

Kimberly Garcia, Digital Marketing Coordinator – San Antonio ISD Foundation

In this session, we will explore the core principles of graphic design and how they can be applied to create visually compelling and effective newsletters for foundations. Participants will learn about layout, typography, color theory, and visual hierarchy to enhance readability and engagement. Additionally, we will discuss best practices for structuring newsletters, incorporating branding elements, and using storytelling to showcase the foundation's impact. Whether you're designing from scratch or refining an existing newsletter, this session will provide practical insights to elevate your communication materials. Attendees will learn how to apply graphic design principles to marketing materials and how to improve their newsletter so it is engaging and impactful.

Session 4

Milam Room

Innovative Programs to Enhance Student Success

Chris Moore, Project Manager – Irving Schools Foundation

Learn about innovative programs enhancing student success at Irving ISD. During this session, you will learn about Spark Tank, Switched-On Learning, and Food For Thought and how best to implement them at your foundation. Attendees will leave with the knowledge of how to implement these programs and, hopefully, the inspiration to create new programs at their foundation.

Session 5

Robertson Leftwich Room

Engaging Alumni

Jessica Almaraz, Director of Donor & Alumni Relations – Alamo Heights School Foundation

Heather McFarland, Executive Director – Alamo Heights School Foundation

In this session, participants will discover innovative strategies to locate and engage alumni while fostering meaningful, long-term relationships with the goal of converting alumni into donors. We'll explore effective ways Education Foundations and School Districts can connect alumni to their donor community, from annual and planned giving to reunions and exclusive alumni events, unlocking new avenues for support. Participants will leave with actionable strategies to build and sustain strong alumni networks, creating pathways for ongoing financial and community support. Attendees will gain the tools to effectively integrate alumni into their donor base, utilizing events, giving campaigns, and personalized engagement efforts to boost long-term contributions.

Session 6

Ranger Room

We Are More Than Fundraisers: How Foundations Can Help Promote and Protect ISDs

Sylvia Rincon, Executive Director – Southside ISD Education Foundation

The primary function of a public school education foundation is to fundraise and promote their public schools. By staying apolitical and avoiding public relations disasters, Southside ISD demonstrates how to highlight the best aspects of public schools in the news, while using this publicity to educate the public about the value of these schools. Attendees will get a flowchart and a step-by-step guide on activities and events that will accomplish these goals. Attendees will also have the opportunity to engage in brainstorming sessions to identify other ideas they can use at their home districts.

5:15 – 6:30 Networking Reception & Award Showcase Exhibits

Baron's Ballroom

6:00 – 8:00 Dinner Buffet

Heartwood House



Thursday, April 10 Schedule

8:00 – 8:45 Breakfast Networking Activity

Baron's Ballroom

9:00 – 10:15 Breakout Sessions

Session 1

Austin Room

Building the Board You Love

Brian Brandt, President – Core Insights

Do you look forward to serving alongside your board? Do they engage and actively contribute? In this session, you'll see and experience a practical approach to recruiting, challenging and equipping a board you'll love. We'll discover common mistakes that lead to board complacency. You will walk away with a clear framework and practical ideas to a stronger, more engaged board.

Session 2

Mina Room

Crafting Policies and Procedures for Your Foundation

Michel Hudson, Owner – 501 Consulting

Policies and procedures can affect various parts of a nonprofit's work, including governance, accountability, and operations. Well-written policies and procedures are the framework that holds an organization together, and they help make everything run smoothly and efficiently. This session is designed to help attendees understand what policies and procedures are needed, and how to develop them so they clearly communicate what they do and why they do it. Participants will:

- Discuss the importance and requirements of policies and procedures;
- Learn about standard policies for nonprofits; and
- Receive tips for policy manuals that are easy-to-understand and user-friendly.

Session 3

Houston Room

How to Integrate Your Marketing and Development Efforts

Brandon Crist, Partner – Sigler Crist Agency

Kenny Sigler, Partner – Sigler Crist Agency

Keeping up with marketing and fundraising tasks can feel daunting. This session will provide practical steps to create structured campaigns that integrate both marketing and fundraising efforts, ensuring they work together while maintaining their unique goals and strategies. Participants will leave knowing how to build a twelve month marketing and development campaign calendar.

Session 4

Robertson Leftwich Room

Championing Our Schools: Becoming an Education Ambassador

Kim Crumrine, Executive Director – Royse City ISD Education Foundation

Scott Milder, Co-founder – Friends of Texas Public Schools

This presentation will explore the role of education foundations in public education and empower you to become an advocate for your district. You are in a unique position to have an inside look at the successes of public education. By sharing positive stories and engaging in meaningful conversations, we can make a difference. Participants will learn practical tips for effectively communicating the value of public education. Participants will be inspired and empowered to become active advocates for their local schools.



Thursday, April 10 Schedule

Session 5

Ranger Room

Creating a Plan in Partnership with Your District to Drive Student Success

Lonique Coots, Project Manager, Career Readiness – Dallas ISD

Mita Havlick, Executive Director – Dallas Education Foundation

Hear how Dallas Education Foundation worked hand-in-hand with Dallas ISD to develop a multiyear, multimillion dollar fundraising campaign to provide resources and programming to drive student success, and learn how you can work in alignment with your district to create significant and sustainable impact. Participants will learn how to gain trust with school district leaders and be viewed as a thought partner. In addition, participants will leave with:

- Strategies to be able to identify gaps
- An understanding of how to align with school district priorities
- An outline of how this could work at their Foundations and district

Session 6

Milam Room

Designer Handbags + Bingo = A Fun Night of Fundraising!

Karen Anderson, Executive Director – Red Oak ISD Education Foundation

Geny White, Executive Director – Texas City ISD Foundation for the Future

Come learn how to implement a fundraising bingo night. Participants will learn what permits, licenses, etc., are required and what it takes to host a successful bingo event. Information on tickets, raffles, sponsorships, etc. will also be shared. This session will provide what it takes to host a fundraising bingo night – what is required by the state, sponsorship levels, ticket sales, and other important details.

10:30 - 11:45 Breakout Sessions

Session 1

Austin Room

Maximize Your Time

Brian Brandt, President – Core Insights

Do you often find yourself frustrated with working too much or not getting to your priorities? In this session, we'll focus on practical tips and tools to maximize the 168 hours of your week. These research based tips will allow you to have the opportunity to give more attention to what matters most to YOU! Participants will see ways to maximize their work and personal time in such a way that makes them more efficient so that they can give attention to those items they want to do, but don't feel as though they have the time. We're sure to see some ways that we are creating obstacles to our personal success, and how to handle obstacles that others produce.

Session 2

Mina Room

Crafting Policies and Procedures for Your Foundation (repeat session)

Michel Hudson, Owner – 501 Consulting

Policies and procedures can affect various parts of a nonprofit's work, including governance, accountability, and operations. Well-written policies and procedures are the framework that holds an organization together, and they help make everything run smoothly and efficiently. This session is designed to help attendees understand what policies and procedures are needed, and how to develop them so they clearly communicate what they do and why they do it. Participants will:

- Discuss the importance and requirements of policies and procedures;
- Learn about standard policies for nonprofits; and
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Thursday, April 10 Schedule

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Houston Room

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Brandon Crist, Partner – Sigler Crist Agency

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Keeping up with marketing and fundraising tasks can feel daunting. This session will provide practical steps to create structured campaigns that integrate both marketing and fundraising efforts, ensuring they work together while maintaining their unique goals and strategies. Participants will leave knowing how to build a twelve month marketing and development campaign calendar.

Session 4

Ranger Room

Partnering with Area Businesses & Community Organizations for CTE & Workforce Ready Programs

Shani Bradshaw, Economic Development Director – Sanger Economic Development Corporation

Valerie Foster, Executive Director – Sanger Education Foundation

Explore how your foundation can facilitate a collaboration and/or implement successful partnerships between your School District, your foundation, local businesses and community organizations such as your local Economic Development Corporation. These unique partnerships support academic Career and Technical programs for students leading to industry standard student certifications benefiting both students and your local workforce. Attendees will leave with knowledge of their unique position in facilitating and fostering non-financial partnerships directly benefiting and impacting students' career and technical opportunities while fostering engaging and meaningful relationships with area businesses and their Economic Development Corporation.

Session 5

Robertson Leftwich Room

From Draft Day to Game Day: Building a Working Board for Lasting Success!

Shawn Callaway, Chief Experience Officer & Owner – Foundation Innovation

Veronica Goldhorn, Vice President of Development – Schertz-Cibolo-Universal City Education Foundation

Rebecca Soto, Vice President of Events – Schertz-Cibolo-Universal City Education Foundation

Just like a championship football team, a highly functional board needs the right players, a solid game plan, and well-executed plays. This session will provide a playbook covering how to recruit top talent, set clear expectations, and structure meetings for maximum productivity. Whether you're drafting new members or fine-tuning your strategy, you'll leave with the tools to build a working board that drives your foundation's mission forward. You will learn practical strategies for recruiting, structuring and maintaining an active working board. Discover tools and templates to facilitate effective communication, onboarding, committee meetings, board meetings, individual committee performance and board effectiveness.

Session 6

Milam Room

From Strategy to Action: Implementing Planned Giving Tools for Lasting Impact

Crystal Scanio, President and CEO – Irving Schools Foundation

In this session, participants will learn how to effectively implement planned giving tools to turn strategic intentions into tangible, long-term support for their organization. Gain practical insights on integrating bequest programs, gift annuities, and other planned giving vehicles into your fundraising efforts for sustained impact from a former Certified Financial Planner turned Certified Fundraising Executive. Attendees will be equipped with the knowledge to integrate planned giving tools into their organization's fundraising strategy, driving long-term donor commitment. Attendees will also gain actionable steps to implement bequest programs, gift annuities, and other planned giving options, ensuring a sustainable pipeline of support for their mission.



Thursday, April 10 Schedule

12:00 – 1:30 Luncheon & Achievement Award Presentations

Baron's Ballroom

1:45 – 3:00 Breakout Sessions

Session 1 – Austin Room

Maximize Your Time (repeated session)

Brian Brandt, President – Core Insights

Do you often find yourself frustrated with working too much or not getting to your priorities? In this session, we'll focus on practical tips and tools to maximize the 168 hours of your week. These research based tips will allow you to have the opportunity to give more attention to what matters most to YOU! Participants will see ways to maximize their work and personal time in such a way that makes them more efficient so that they can give attention to those items they want to do, but don't feel as though they have the time. We're sure to see some ways that we are creating obstacles to our personal success, and how to handle obstacles that others produce.

Session 2

Mina Room

Education Foundation Alphabet Soup: Navigating the ABC's and 123's of Education Foundation Compliance and Governance

Shawn Callaway, Chief Experience Officer & Owner – Foundation Innovation

Tracy Phelps, Client Relations & Operations Director – Foundation Innovation

With so many acronyms and numerated forms, it can be easy to get lost in the alphabet soup of nonprofit compliance and governance. Where do I find a copy of my 1023? Has my Board updated our MOU? What is the SOS Form 401, and when and how do I file it? This session will help demystify these alphanumeric quandaries while also outlining best practices for education foundation compliance and governance. Attendees will learn how to navigate required forms and governance practices to stay compliant. This presentation is best suited to new foundations or people new to education foundations.

Session 3

Ranger Room

Boosting Your Brand for Personal & Organizational Growth!

Dawn Parnell, Lead Strategist – Foundation Innovation

Just like a corporate brand, your personal brand is the combination of your skills, values, and the impression you leave on others. In this session, you will learn about strategies you can take to help define, develop, and communicate your personal brand while also boosting your foundation's image. Attendees will learn practical tips for "bragging" on their personal and organizational brand through: social media posts, special events, campaign initiatives and more!

Session 4

Houston Room

A Match Made in Education: Foundations + Staff Recruitment + Retention = Success.

Suzi Pagel, CFRE – Foundation Innovation

In a time of statewide teacher shortages, school districts are actively working to recruit and retain classroom teachers. The education foundation can be a vital partner in helping to attract professionals to their school district as well as retaining the valued staff members they already have. Come learn about ways the education foundation can partner with the district in this vital initiative. Attendees will:

- Understand the education foundation's potential to partner with the district to recruit and retain essential staff members.
- Identify at least three activities that the education foundation could implement or expand in the coming



Thursday, April 10 Schedule

school year.

- Consider the legal ramifications of staff incentives or payments and understand the foundation's responsibility to obtain professional advice before issuing incentives or salary payments.

Session 5

Robertson Leftwich Room

Community Engagement: Building Connections that Drive Impact

Adriana Vincent, Marketing & Development Manager - Irving Schools Foundation

Discover innovative strategies to foster meaningful community partnerships that drive lasting impact. This session will explore effective engagement techniques, real-world success stories, and actionable steps to strengthen connections between organizations and the communities they serve. Attendees will learn how to implement effective engagement strategies and will gain practical tools and techniques to build and sustain impactful community partnerships. Attendees will also learn how to foster stronger relationships with stakeholders to drive meaningful change and long-term success.

Session 6

Milam Room

Capacity Building: Ready to Be Bold

Judy Geelhoed, Executive Director - San Antonio ISD Foundation

Heather McFarland, Executive Director - Alamo Heights School Foundation

Participants will learn to identify available goals, expand their foundation's reach, secure sustainable funding, and strengthen leadership, ultimately increasing their organization's capacity for long-term growth. Attendees will gain insights into identifying organizational needs, building a strong vision, and developing the leadership and infrastructure necessary for long-term success. Attendees will also receive tips to continue quality improvement and allocation of resources.

3:15 - 4:30 Breakout Sessions

Session 1

Austin Room

Critical Keys to Leadership

Brian Brandt, President - Core Insights

In this fast-moving session, we'll consider keys to leadership that are often neglected or overlooked. The success of an organization often hinges on leadership. Are you continuously seeking to grow the skills that it takes to guide your foundation? We'll walk away with practical next steps on how to reach the next level in our leadership journey. Additionally, you'll be emboldened to guide your foundation from the practical ideas and tips on these vital aspects of leadership.

Session 2

Ranger Room

The 21st Century "Bucket Brigade" Will Grow Your Foundation's Revenue!

Shawn Callaway, Chief Experience Officer & Owner - Foundation Innovation

Diversify, Diversify, Diversify... those words from every HS Economics teacher rings true in 2025 and holds true for your Foundation too. Let's discover ways to diversify your revenue streams and create more "drops in the bucket" so that your Foundation will fulfill its "bucket list" before it "kicks the bucket!" Discover the opportunities that three buckets of revenue annually can produce and how to structure your EF for maximum success. Learn the impact that having an annual campaign bucket, an event bucket and a private foundation bucket will have on the students and teachers in your district and how first year foundations raise over \$150,000 in their inaugural year.



Thursday, April 10 Schedule

Session 3

Mina Room

Branding Better with CANVA

Briana Estrada, Multimedia Specialist - Judson ISD

Natalie Guzman, Publication Specialist - Judson ISD

Let's embark on a branding and marketing adventure with Canva! In 'Branding in the Wild,' we'll learn why branding is your guiding star, explore Canva as a marketing tool, and discover the spark for creating engaging content. Create cohesive and engaging marketing materials. Enhance social media presence with strategic branding. The presentation will be done over a Canva presentation, including interactive handouts for audience members, and interactive Canva building activities within the presentation to follow along.

Session 4

Houston Room

BFFs: Powering Up Your Foundation with District Communications

Suzi Pagel, CFRE - Foundation Innovation

Dawn Parnell, Lead Strategist - Foundation Innovation

Discover how to leverage your district's communications team to supercharge your foundation's impact. Join us for tips, tricks, and real-world examples from a former foundation executive director and a former district communications officer. Attendees will consider positive ways for the Education Foundation and ISD's Communications Office to partner to promote the school district and will acquire at least two actionable items that the local education foundation can implement in the coming school year.

Session 5

Robertson Leftwich Room

Local Influencers, Big Impact: How Your Foundation Can Harness Community Voices

Cameka Crawford, President - The Richardson ISD Foundation

Think influencers are out of reach for education foundations and nonprofits? They're not! This session will show you how to tap into local influencers, leverage their impact to boost awareness and engagement, and explore a real-life case study of a successful strategy in action. Presentation outcomes include:

- Identify and Engage Local Influencers - Learn how to recognize influential individuals within your community and develop strategies to collaborate with them to support your foundation's mission.
- Implement an Effective Influencer Strategy - Gain actionable ideas and best practices, supported by a real-life case study, to increase awareness and engagement for your foundation through community-driven influence.

Session 6

Milam Room

Stronger Together: Aligning Ed Funds with District Priorities

Allison Brubaker, Office of Innovation and Development - Austin ISD

Michelle Wallis, Executive Director - Austin Ed Fund

Join Austin Ed Fund leadership to learn how education foundations can be more responsive to the districts they serve. Over the last year, Austin Ed Fund's support for Austin ISD's early literacy initiative has led to direct improvements in student outcomes. Hear how Ed Fund aligns with district priorities, rallies support, informs strategy and convenes thought partners for ongoing cultivation and learning. Be empowered to focus your organization's strategy using this example of how charitable dollars/partnership made a positive change for student learning and best practices in the classroom. A well-informed group of thought leaders and funders are a powerful source of change when working together.

5:00 - 7:00 Networking Reception & Dinner Buffet

Heartwood House



Friday, April 11 Schedule

7:30 – 8:00 Breakfast Grab & Go

Baron's Ballroom Foyer

8:00 – 9:15 Breakout Sessions

Session 1

Austin Room

Limitations on Lobbying and Other Political Activities by Education Foundations

Janet Bubert, Attorney – Underwood Law Firm

This presentation will explore the extent to which nonprofit organizations may lawfully engage in lobbying and other political activities. In addition to reviewing restrictions imposed by state and federal law, we will discuss the practical and ethical issues that should be considered by an education foundation's board related to engaging in such activities. Participants will obtain knowledge to ensure the organization's compliance with applicable law related to lobbying and political activities. Participants will learn to identify strategic and practical issues that should be considered before an organization decides to engage in lobbying activities.

Session 2

Ranger Room

The Hidden Culprit of Burnout: Tackling Internal Stressors for Sustainable Success

Tara Odell, Owner and Founder – Tara Odell LLC

Discover the hidden stressors fueling burnout in leaders and gain powerful strategies to break free from the cycle of constant demands, overcommitting, and never feeling like it's enough. This interactive workshop will provide practical tools to build resilience, sustain your impact, and foster a healthier, more balanced approach to leadership. Attendees will:

- Gain clarity on hidden stress patterns – Identify the internal pressures driving burnout, such as overcommitment and never feeling like you've done enough, so you can break free from the cycle.
- Walk away with actionable strategies—Learn practical tools to build resilience, set healthier boundaries, and create a more sustainable approach to leadership and impact.

Session 3

Mina Room

Managing Diverse Needs of Multiple Campuses

Alan Sale, Assistant Director of Development – Northside ISD

Katherine Sanchez-Rocha, Executive Director – North East Educational Foundation

Come join us for an interactive session discussing ways to reach your population when you have a lot of school or a lot of space (or maybe a bit of both) and not enough time. Learn and share about helping your community when you cannot solicit them one by one. Is your District Big? Small? We want them all! This interactive session will begin with a short introduction from Katherine and Alan, followed by a PowerPoint presentation. Participants will then engage in focused discussions at tables grouped around specific questions. Various materials will be available to support these interactive discussions.

Session 4 – Houston Room

Cultivating a Culture of Generosity: Employee Giving Campaign

Kim Crumrine, Executive Director – Royse City ISD Education Foundation

What's the secret to inspiring staff generosity? Join us to learn four actionable steps to connect with district staff and cultivate a culture of giving. Discover how staff philanthropy strengthens your organization's reputation, fuels your mission, and directly impacts classrooms and students. This session will explore the power of appreciation, transparency, and relationship building – plus, we'll share a few fun engagement ideas! Participants will leave with a clear, actionable plan to implement or enhance any staff giving program.



Friday, April 11 Schedule

Session 5

Robertson Leftwich Room

Future of Fundraising

Rachel Muir, CFRE

Can you snap your fingers to see the future of fundraising? Get a front-row seat in this eye-opening exploration loaded with practical and aspirational fundraising ideas. Our special guest Rachel Muir, CFRE is revealing tips and strategies to help you win your donor's hearts, minds & wallets. You'll leave inspired, delighted, and ready to engage donors at every giving level. You'll get irresistible tools to help you stand out in a crowded inbox, delight your donors with thoughtful stewardship, successfully get your foot in the door and know if your message is getting through. This fun-filled fast-paced session will wrap with best-of eye candy fundraising campaigns from budgets small and large. You'll also walk away with secrets you can STEAL from for-profit brands to keep your donors loyal for life.

Session 6

Milam Room

AI in Nonprofits

Bhavani Kola, Eclatech Solutions LLC

This hands-on, interactive workshop is designed to empower education foundations with transformative AI skills that directly benefit their strategic decisions and operational efficiency. Attendees will learn how to use AI in fundraising strategies, designing social media campaigns, and writing personalized grant applications. Attendees will also engage in hands-on exercises to create customer-specific emails, draft legal documents aligned with bylaws, and plan community outreach initiatives. By the end of this session, education foundations will understand how AI can enhance outcomes, streamline operations, and foster data-driven decision-making aligned with their foundation's mission.

9:30 - 10:45 Breakout Sessions

Session 1

Austin Room

Limitations on Lobbying and Other Political Activities by Education Foundations (repeated session)

Janet Bubert, Attorney - Underwood Law Firm

This presentation will explore the extent to which nonprofit organizations may lawfully engage in lobbying and other political activities. In addition to reviewing restrictions imposed by state and federal law, we will discuss the practical and ethical issues that should be considered by an education foundation's board related to engaging in such activities. Participants will obtain knowledge to ensure the organization's compliance with applicable law related to lobbying and political activities. Participants will learn to identify strategic and practical issues that should be considered before an organization decides to engage in lobbying activities.

Session 2

Ranger Room

The Hidden Culprit of Burnout: Tackling Internal Stressors for Sustainable Success (repeated session)

Tara Odell, Owner and Founder - Tara Odell LLC

Discover the hidden stressors fueling burnout in leaders and gain powerful strategies to break free from the cycle of constant demands, overcommitting, and never feeling like it's enough. This interactive workshop will provide practical tools to build resilience, sustain your impact, and foster a healthier, more balanced approach to leadership. Attendees will:

- Gain clarity on hidden stress patterns - Identify the internal pressures driving burnout, such as overcommitment and never feeling like you've done enough, so you can break free from the cycle.



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- Walk away with actionable strategies—Learn practical tools to build resilience, set healthier boundaries, and create a more sustainable approach to leadership and impact.

Session 3

Mina Room

Collaborative Engagement

Alan Sale, Assistant Director of Development – Northside ISD

You have POWER at your fingertips by working with Campuses and Departments. Join me for an interactive session discussing how the Education Foundation can collaborate with different departments to grow. Learn and share about how to work with campuses and departments within your district to grow the impact that the Foundation and Campuses can have by working together. Learn what other Foundations are doing to further engage all the tools they have through their students.

Session 4

Houston Room

Endowments – Evaluating your Foundation’s Capacity and Best Practices

Valerie Foster, Executive Director – Sanger Education Foundation

This session explores what an endowment fund is while focusing on the many options and means in which to establish and/or expand your endowment. Participants will learn if you have the capacity or policies to grow an endowment fund while exploring if your supporters lend themselves to being cultivated into having endowed funds through legacy gifts, memorial gifts or through estate planning. Lastly we will discuss endowment funds are not just for scholarships or the general fund but more importantly can be created to support teacher grants, CTE programs, and any other identified student programs.

Session 5

Robertson Leftwich Room

Today’s Fundraising Gold Mine: Legacy Gifts

Rachel Muir, CFRE

Whether you are new to legacy giving or an old hat, this workshop will give you everything you need to quickly secure a bountiful nest egg of donors naming you in their will or estate. Why is this so critical now? The average planned gift is between \$100,000 and \$250,000 and realized in as little as 1 to 4 years, but reality check: your largest and most generous donor groups – the very backbone of your current fundraising will be passing on. If you don’t secure bequests from them now, you’ll suffer a huge drop in revenue. This session will help you turn on the firehouse since giving by legacy donors spikes 77% on average after they name you in their will. Our special guest Rachel Muir, CFRE is showing you:

- How to launch a planned giving program from scratch
- Who your best prospects are
- What to ask to reveal planned gifts
- Eye candy examples planned giving marketing
- Simple strategies to start marketing planned giving at your organization
- The unique psychology of asking for the final gift
- How to talk about planned giving with someone who is ill

Session 6

Milam Room

AI in Nonprofits

Bhavani Kola, Eclatech Solutions LLC

This hands-on, interactive workshop is designed to empower education foundations with transformative AI skills that directly benefit their strategic decisions and operational efficiency. Attendees will learn how to use AI in



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fundraising strategies, designing social media campaigns, and writing personalized grant applications. Attendees will also engage in hands-on exercises to create customer-specific emails, draft legal documents aligned with bylaws, and plan community outreach initiatives. By the end of this session, education foundations will understand how AI can enhance outcomes, streamline operations, and foster data-driven decision-making aligned with their foundation's mission.

11:00 - 11:45 General Session

Baron's Ballroom

Pamela Benson Owens, CEO - Edge of Your Seat Consulting & TEFN Camp Director

You came, you heard, you pondered, you connected. It is so easy to rush back to our work lives and forget about the amazing moments that made this time away so valuable. During this closing ceremony check-in we will talk about what we learned, what we will take back with us, and what a new pathway of centering humanity and community looks like moving forward.



2025 Speaker Directory

Speaker	Organization	Title	Email
Adriana Vincent	Irving Schools Foundation	Marketing & Development Manager	acolunga@irvingisd.net
Alan Sale	Northside ISD	Assistant Director of Development	alan.sale@nisd.net
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2025 Speaker Directory

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2025 Outstanding Achievement Award Recipients



Austin Ed Fund

Summer Internship Program



Friendswood ISD Education Foundation

Continuing Education Scholarship Program

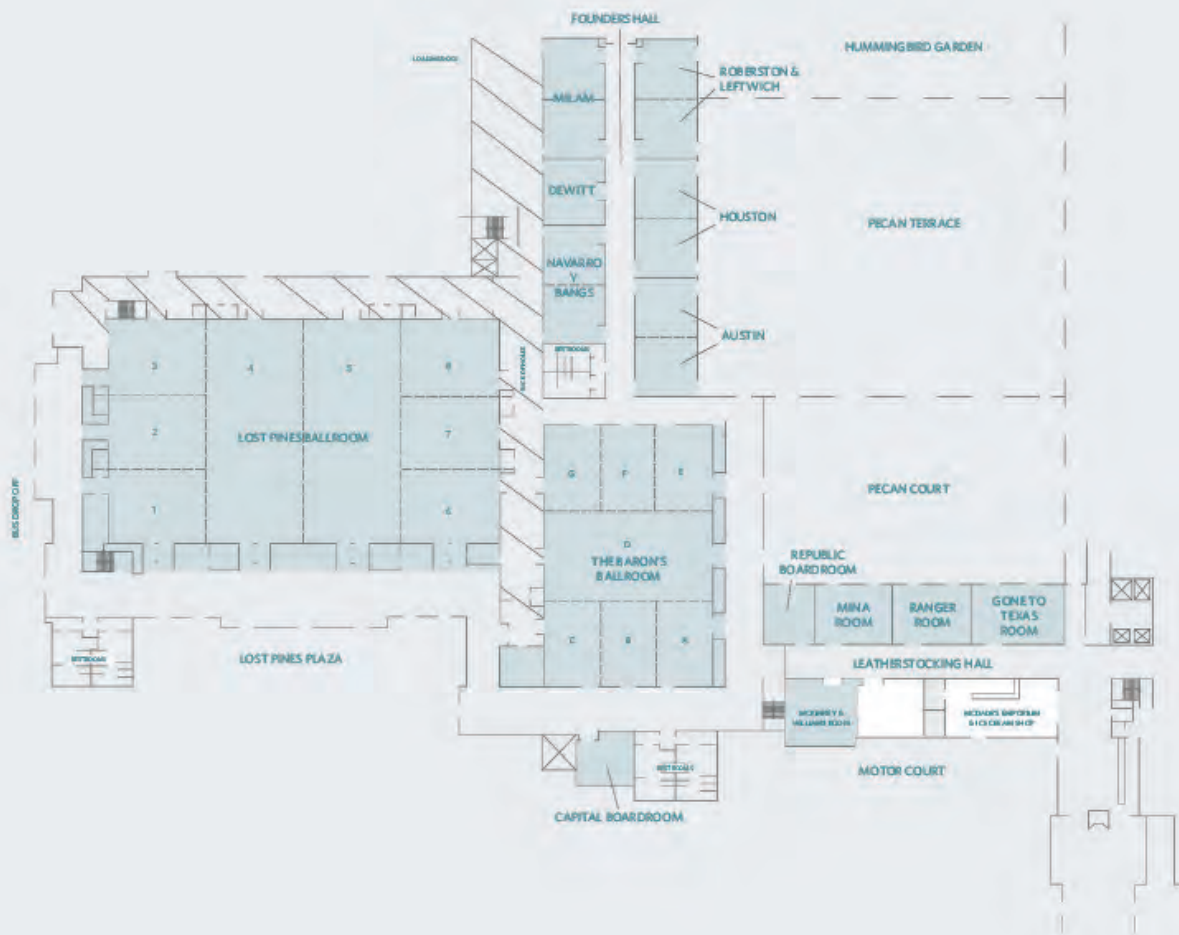


Sanger Education Foundation

Sanger Workforce Achievement Grant Program



FLOOR PLANS
Indoor Function Space



FLOOR PLAN
Outdoor Function Space



Texas Education Foundation Network is
a program of the



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