

**Texas Education Foundation Network
Embassy Suites Hotel & Conference Center
San Marcos, Texas**

**Pre-Conference & Annual Conference Schedule
April 8-9, 2019
(subject to minor changes)**

Monday, April 8, 2019

8:00 – 5:00 **CONFERENCE CHECK-IN**
Spring Lake
Ballroom A-C

8:00 - 5:00 **CONFERENCE LOUNGE OPEN**
Veramendi E

8:30 – 11:30 **PRE-CONFERENCE SESSIONS**

- **MUST be pre-registered to attend**
- **Arrive 30 minutes prior for check-in**

Veramendi A **Fish Camp - New to School Foundations**
Maya Bethany, Founder & Executive Director – 1 in 3 Foundation
Suzi Pagel, CFRE, Director of Corporate & Community Development –
Midway ISD Education Foundation
If you are a brand-new foundation, a young organization, or you are exploring the idea of creating a foundation, Fish Camp is geared specifically for you! This session includes the fundamentals necessary to develop and build capacity for a foundation and maximize success. Start out on the right track! Together, we will explore structure, policies, board member recruitment, marketing, program funding and fundraising. Attendees will also be guided through the TEFN conference agenda to determine the best sessions for beginners.
Recommended for: New Foundations, Emerging Foundations, Foundation Staff and Foundation Boards.

Veramendi B **Executive Director Bootcamp**
Laurie Cromwell, CFRE, President – Foundation Innovation
Erica Ekwurzel, CFRE, Founder – CivicAIM
As education foundations continue to develop and build capacity for the organization, one of the key components is staffing. This deep dive, interactive training is designed for executive directors, managers, and administrative staff of education foundations that support public school districts. Although many education foundations are hiring individuals with nonprofit experience, they are not always familiar with education foundations and the relationship required with the school district they support. The job of an executive director is challenging, and specialized training will help their productivity, impact and effectiveness. It can be intimidating and even overwhelming for a new executive director working with a board of volunteers, employees of the school district, and philanthropic donors. This training will help alleviate the on the job training scenario and will focus on the following areas:

- ***Governance** – understanding the oversight, compliance and overall structure*

of an education foundation is paramount to success. We will discuss how the governance committee has become a vital component.

- *Board Development - engaging your board to the mission of the education foundation through lively agendas and heartfelt discussions. We will discuss the process of identifying, recruiting, onboarding, and retaining effective board members.*
- *Fundraising & Donor Relations – creating a climate of philanthropy to be the charity of choice for education through identifying, soliciting, and stewarding donors as well as managing donor records. We will discuss how you can change your administrative board into a fundraising board.*
- *Day to Day Operations - managing the planned and unplanned duties. We will discuss how to best manage your time to be an effective leader for the board of directors of your education foundation.*

Recommended for: Foundation Staff

Veramendi C-D How Creative Thank You's and Cultivating an Attitude of Gratitude Can Boost Fundraising

Lynne Wester, Principal & Founder – Donor Relations Guru Group

Most nonprofits are leaking donors like crazy. They acquire; they don't retain. On average folks lose 8 out of 10 donors after the first gift. While donors want to change the world with their gifts, most want something else too. It's intangible, but it's important. And if you won't give it to them, someone else will. The important social acknowledgement and identity reinforcement that comes from a heartfelt, thoughtful thank you cannot be underestimated. Truly, how and when you thank your donors can make or break your entire fundraising program.

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

Monday, April 8, 2019:

12:00 – 1:30 OPENING LUNCHEON, AWARDS & KEYNOTE ADDRESS
Spring Lake Bobby Stroupe, Founder/President - APEC
Ballroom A-C “Be the Best. You.”

1:45 – 2:45 BREAKOUT SESSIONS (Six Concurrent Sessions)

Veramendi A Be the Best. You. (keynote continuation)
Bobby Stroupe, APEC
How do we serve ourselves in a life dedicated to service for others? Why is protecting yourself the most unselfish thing you can do? The pleasure of your life is being yourself. Run your race. Find your rhythm. Maximize yourself so you can serve others in the way that only you can.
Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

Veramendi B How to Maneuver and Capitalize on the Latest Trends for Education Foundations
Laurie Cromwell, CFRE, President – Foundation Innovation
In a time when policies and trends are constantly changing, it can be hard to stay informed let alone make the most of new shifts in the education foundation climate. But change doesn't have to be scary or something to resist. Learn more

about topics such as generational giving, tax reform giving, and outreach to new and current donors. Embrace the future of philanthropic giving trends to benefit and increase the capacity and impact of your foundation.

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

Veramendi C

Essential Education Foundation Documents and Policies

Suzi Pagel, CFRE, Director of Corporate & Community Development – Midway ISD Education Foundation

Your nonprofit corporation is just that...a corporation. There are required documents that you must have, and there are recommended policies and documents that you should have. Come learn the difference between the two and leave with a checklist of items that you'll want to have on hand for your education foundation.

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

Veramendi D

Creative Board Meetings for Better Decisions

Brian Brandt, CEO – Core Insights

What would happen if you could make board meetings both more engaging and result in better decisions for the organization? Participants in this session will not just hear about various methods and examples, but experience ways to engage the board and tap into their wealth of knowledge and experience. Your board will thank you, be more engaged and create better solutions.

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

**San Marcos
River A-B**

Reinventing Events from Impact to Metrics

Lynne Wester, Principal & Founder – Donor Relations Guru Group

How can recurring events be refreshed, revitalized and re-imagined without compromising tradition or constituent expectations? This session will highlight innovative approaches to Homecomings, Reunions and other campus customs and events. As we attempt to make events memorable, bringing the process into the 21st century has, at times, been a struggle. Learn best practices for uses of new media, technological effects at events, modern and budget-conscious registrations, social media and eye-popping advances to make events run more smoothly. We will discuss how to drive larger response, attendance understand the importance of behavioral data and advanced event strategies for the future.

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

**2:45-3:45
Spring Lake
Ballroom A-C**

Break & Roundtables Session

Roundtable Presenters & Topics:

Table 1: Employee Payroll Giving Program

Karen Anderson, Executive Director – Red Oak ISD Education Foundation

Table 2: Sparking Higher Level Board Engagement

Brian Brandt, CEO – Core Insights

Table 3: Legal Q&A

Janet Bubert, Attorney – Underwood Law Firm

Table 4: Alumni Development

Jim Burgraff, CEO – Alumni Nations

Table 5: Fundraising Events

Lisa Cox, Executive Director – Garland ISD Education Foundation

Table 6: Board Engagement & Teamwork

Erica Ekwurzel, CFRE, Founder – CivicAIM

Table 7: Donation Gift Acceptance ~ What Besides Cash?

Valerie Foster, Executive Director – Sanger Education Foundation

Table 8: Managing a Student Scholarship Program

Judy Geelhoed, Executive Director – San Antonio ISD Foundation

Table 9: Kinder Club

Kathi Haralson, Executive Director – Eanes Education Foundation

Table 10: Strategic Planning

Michel Hudson, Board Member – Pflugerville Education Foundation

Table 11: Board Burnout Prevention

Allison Kane, Executive Director - Pflugerville Education Foundation

Table 12: Board Organization & Committee Work

Deborah Laine, Executive Director – Clear Creek Education Foundation

Table 13: Concert Booking 101 (Adding Concerts to Gala Events)

Randy Lewallyn, Executive Director – Mesquite ISD Education Foundation

Table 14: Telling Your Story

Jon McCollough, Executive Director – Northeast Texas Community College Foundation

Table 15: Foundation & District Relationships

Angie Mendez, Executive Director - Hays CISD Education Foundation

Table 16: Employee Campaigns

Jerri Monbaron, Executive Director – Humble ISD Education Foundation

Table 17: Foundation Fundraising Events

Kelsey McNeil, Foundation Staff – Clear Creek Education Foundation

Table 18: Amazing Fundraising Examples

Rachel Muir, Nonprofit Consultant, Speaker & Trainer

Table 19: How to Utilize the Newest Technology to Market Your Foundation

Suzi Pagel, Director of Corporate & Community Development – Midway ISD Education Foundation

Table 20: Alumni Development

Denise Root, Executive Director – Cedar Hill ISD Education Foundation

Table 21: Teacher Grant Programs

Jennifer Twiss, Foundation Staff – San Antonio ISD Foundation

Table 22: Social Media

Allison Vrana, Executive Director – La Vega Pirates Education Foundation

Table 23: Sharing Tips, Tricks & Best Practices

Mary Worthington, Community Relations Manager – Richardson ISD

Table 24: EF's to PTOs to Partnerships to Advertising: Working Together for Your District

Kristin Zastoupil, Executive Director of Marketing & Communications – Forney ISD

4:00 - 5:00

BREAKOUT SESSIONS (Six Concurrent Sessions)

Veramendi A

Supercharge Your Fundraising with Giving Days

Erica Ekwurzel, CFRE, Founder – CivicAIM

Charlotte LaGrone, Executive Director – Weatherford ISD Education Foundation

Giving Days can be an invaluable and cost-effective tool for education foundations to raise funds and expand their donor community. This session will introduce Giving Days and provide a 'behind-the-scenes' view on how to make the most of local Giving Days by designing effective branding and marketing strategies. The session will also include tips on harnessing the power of board members and supporters to help your non-profit organization take fundraising to the next level!

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

Veramendi B

Legal Update - Responding to Requests for Information from the Public - Do You Have to Share?

Janet Bubert, Attorney – Underwood Law Firm

Are your organization's financial records confidential? Do you have to share minutes from your board meetings? What if someone requests your donor list? During this session, we will review when and how an education foundation should respond to requests for information from the public. If your organization is subject to the Texas Public Information Act, we will also review the procedures for responding and common exceptions that may apply for education foundations.

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

Veramendi C

Secrets of Storytelling

Rachel Muir, CFRE – Nonprofit Consultant, Speaker & Trainer

Ready to win your donor's hearts, minds, and wallets? A powerful story makes your case in an unforgettable way that can dramatically grip your donor and engage them in your cause. Rachel will be revealing powerful storytelling makeovers, sharing the recipe for great storytelling, tips on nurturing a great pipeline of stories from your front lines, and unique formats for sharing great stories with your donors that fulfill their desires to feel appreciated, included and in the know.

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

Veramendi D

Building Capacity within Your Foundation & District

Valerie Foster, CEFL, Executive Director – Sanger Education Foundation

This session will focus on the why and how to build sustainable and interim financial capacity by engaging individuals and area businesses. As school districts grow and develop new programs for student achievement, funding priorities and academic focuses change. Attendees will explore how to work side by side with their school district in identifying and aligning funding priorities with current and or new area businesses designed around student achievement.

Recommended for: Intermediate and Advanced Foundations; Foundation Staff and Boards

San Marcos River A **Best Practices for Effective Networking**
Brian Brandt, CEO – Core Insights
Do you dread networking? Do you leave events wondering if you served your foundation well? For many people, the ability to engage well and create stronger connections is important - if not imperative to the success of their foundation. For this hands-on program, join us to hone the skill of networking; before, during and after events. You'll see results in your board and volunteer recruitment, fundraising, partnerships and more.
Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

San Marcos River B **Strategies for Alumni Engagement**
Jim Burgraff, CEO – Alumni Nations
Alex Burgraff, Chief Marketing Officer - Alumni Nations
This session will discuss how to jump start alumni engagement including: developing a strategy, finding your alumni, understanding what's important to alumni, using technology to extend your capacity, creating a narrative and communications calendar, developing metrics and goals, the importance of participation in reunions and events, and revenue outlook (planting trees vs. wheat).
Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

5:30 - 6:30 **CONFERENCE RECEPTION - heavy appetizers, meet & greet, pictures**
Spring Lake Ballroom A-C **(Regional group pictures will begin at 5:45)**

6:30 - 10:00 **DINNER ON YOUR OWN (DOWNTOWN BUS SERVICE)**

Tuesday, April 9, 2019

8:00 - 12:00 **CONFERENCE LOUNGE OPEN**
Veramendi E

8:00 - 9:00 **BREAKOUT SESSIONS (Six Concurrent Sessions)**

Veramendi A **What's Your Fight Song?**
Karie Price, Brand Messaging Coach
Learn how to figure out what your community wants and values, so you can incorporate that into your "fight song" and get everyone chanting along.
Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

Veramendi B **Making One Ask: Collaborating with District Partnerships, Foundations, Parent Groups, Nonprofits and Faith-Based Organizations**
Kristin Zastoupil, Executive Director of Marketing & Communications – Forney ISD
Dana Curry, Community Partnerships Coordinator – Forney ISD
Kate Keierleber, Executive Director - Forney Education Foundation
How many times do you ask your community for a donation? Volunteers? Advertising dollars? Multiply that by 10 for everyone else affiliated with your

district that asks. Learn how to make one ask, and get your community working with you year-round through a collaborative learning community between your district, nonprofits, parent organizations, education foundations and faith-based organizations. We'll share a successful, model program and how you can replicate in your district.

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

Veramendi C

Grants Part I: Demystifying Grants

Erica Ekwurzel, CFRE, Founder – CivicAIM

New to grants and not sure how or where to start? This training offers a comprehensive introduction to philanthropic grants, such as understanding the different types of grants, ways to identify and research funding prospects, key components to proposal writing, and overall, how best to position your education foundation on the road to finding future funding opportunities.

Recommended for: Emerging and Intermediate Foundations; Foundation Staff and Boards

Veramendi D

You've Got a Friend in Me: Creating Ambassadors for your Mission

Juliana Castillo, Development Specialist – Austin Ed Fund

Cynthia Smith, Project Specialist III - Austin Ed Fund

You engage with a lot of amazing people in this line of work – board members, donors, teachers, and more. Who better to tell your foundation story than those already invested in it? Engage your stakeholders as Awesome Ambassadors, who can help tell your story and mission with their own personal touch. This session will provide a framework and tools to integrate these friends seamlessly into signature events to successfully achieve your organizational goals.

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

**San Marcos
River A**

Taking It to the Next Level: Beyond Classroom Grants

Suzi Pagel, CFRE, Director of Corporate & Community Development – Midway ISD Education Foundation

Classroom grants are great, and usually the first program that education foundations roll out because they are so well-received and impactful. But what other programs and projects have other foundations provided in addition to classroom grants to enhance education in their districts? This session will highlight education foundation programs from around the state and may just provide the next idea you can recommend to your foundation board!

Recommended for: Intermediate and Advanced Foundations; Foundation Staff and Boards

**San Marcos
River B**

The Willy Wonka School of Visual Storytelling

Maya Bethany, Founder & Executive Director – 1 in 3 Foundation

"The suspense is terrible. I hope it'll last."--Willy Wonka, Charlie and the Chocolate Factory. We all love the intrigue of a good story. What happens next? What is the kicker to the story? How does it make you feel? Slick, polished graphics and captivating visuals aren't exactly what you need to make a great video to tell your foundation's story. Sometimes a little mystery and a lot of heart can go far with your audience. Explore the components of building your brand, telling your organization's story, capturing the attention of your viewers and translating those components into your fundraising goals.

Recommended for: Emerging, Intermediate and Advanced Foundations;

Foundation Staff and Boards

9:15-10:15

BREAKOUT SESSIONS

Veramendi A

Tools for Board Development

Valerie Foster, CEFL, Executive Director – Sanger Education Foundation

This session will focus on the role of a board member, how the initial on-boarding of a new board member will set the stage for their engagement, what the foundation staff and executive director's interaction with the board looks like and how those relationships effect the organization as a whole. Attendees will walk away with key points on creating a cohesive and perspective of the role each play to the overall success of a non-profit organization.

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

Veramendi B

From Good to Great: A Two-Year Foundation Transformation

Amy Lane, Executive Director - North East Educational Foundation

Carr Hornbuckle, Vice Chairman – North East Educational Foundation

You and your board have identified your foundation needs a change...now what? This session will share the two-year journey that drastically changed the operations, structure, results, energy and impact of the North East Educational Foundation. This presentation will include:

- *Steps to plan and achieve a strategic transformation*
- *2017-2018 annual report results one year after changing board structure*
- *Roles of board members vs. roles of staff*
- *Restructuring board meetings for efficiency and engagement*

Recommended for: Emerging and Intermediate and Foundations; Foundation Staff and Boards

Veramendi C

Grants Part II: Learning Lab: Best Practices to Writing Compelling Grant Proposals

Erica Ekwurzel, CFRE, Founder – CivicAIM

Writing that first grant can seem a bit overwhelming, but it doesn't need to be! This session is highly participatory to orient novice grant writers about the world of grants and provide practical advice and templates to make grant writing a less daunting task. Participants will walk away with excitement about the rewards that can come from writing compelling grants and finding encouraging, engaged partners for their mission along the way.

Recommended for: Emerging Foundations; Foundation Staff and Boards

Veramendi D

Community & Partner Engagement: The Journey from Volunteer to Donor

Mary Worthington, Community Relations Manager – Richardson ISD

April is National Volunteer Month, and to celebrate, come learn how to turn your valuable volunteers into donors! According to data from the International Association of Fundraising Professionals Conference, the average volunteer is FOUR TIMES as likely to donate as someone who doesn't volunteer, and they typically give TEN TIMES as much!

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

**San Marcos
River A**

Planned Giving 101- Expand Your Fundraising Capacity

Judy Geelhoed, Executive Director - San Antonio ISD Foundation

Mark Browning, Board Member – Planned Giving Council of San Antonio

This session will look at the common types of planned giving methods, also known as estate giving or deferred giving and their importance to a fundraising program. Ways to promote planned gifts will also be discussed.

Recommended for: Intermediate and Advanced Foundations; Foundation Staff and Boards

**San Marcos
River B**

The 10 Simple Lessons in Fundraising

Jim Eskin, Founder – Eskin Fundraising Training

Fundraising is not complicated, but many people are intimidated by it, and some are downright terrified of asking for money. In this interactive workshop, you will learn about 10 simple lessons of fundraising based on common sense and gain valuable tools to help advance the mission of your organization. With this expertise, you'll be able to take immediate steps that lead to rich relationships and gifts from donors -- and putting the fun in FUNdraising.

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

**10:30 - 11:15
Spring Lake
Ballroom A-C**

GENERAL SESSION

Karie Price, Brand Messaging Coach

“An Inspired Message that ROARS: How to Rally your Community to Go, Fight, Win for Education”

Children really are the future, and our schools are a key force in shaping them into the future leaders they will become. You want to support innovation and excellence in education, yet sometimes it feels like there aren't enough people backing the cause. But you can inspire more participation, excitement, and donations from your community – if you have the right message and know how to use it.

Recommended for: Emerging, Intermediate and Advanced Foundations; Foundation Staff and Boards

**11:15 - 11:30
Spring Lake
Ballroom A-C**

CLOSING REMARKS