

## 2017 Regional Meeting Notes North, Central and South Meetings

### Education Foundation (EF) News

- Westfield EF had an unexpected estate gift left to them from a new donor which was a pleasant surprise.
- Pike Township EF recently absorbed the district's alumni association which includes scholarship funds. They also recently had their gala event and raised \$20,000 more this year with that event.
- Brownsburg EF also recently had their gala. Donations from individuals has increased this year. They also raise money through an annual Yankee candle sale and raised around \$40,000.
- Wayne Township EF has seen an increase in donations at least in part to the publicity around many of the Wayne Township teachers donating their "bonus" of \$42 from the state to the EF. Pike Township commented that they received some residual donations, too, due to the publicity around Wayne Township's situation.
- Zionsville EF has two new staff members – Lyle Browne and Katie Reasoner who have been at the foundation for about a month and are just getting acclimated to their new roles.
- Lawrence Township SF now has 48% of their staff participating in the payroll deduction program. Their program is set up so people do not have to re-enroll each year unless they want to change their donation amount. The foundation reports the participation percentage to the principals for competitive purposes. They also gave out \$18,000 in Neighborhood Assistance Program (NAP) tax credits in the past year.
- Greenwood EF hosted a Monte Carlo night and doubled their profit in the second year it was offered. They've given out \$60,000 in grants in the two years they've been in existence.
- Clark-Pleasant EF has been in existence for five years and have 1.5 endowments funded so far.
- Center Grove EF just completed its annual gala.
- Advancement Center for Washington Township Schools is working on its branding. They had a North Central alumni day of giving asking alum to give \$1 for every year they've been out of school. They have a 1955 Society (after the year the school was founded) for those giving \$1,000 or more annually.
- Mt. Vernon EF is working on strategic planning and branding. They've done a gala and an annual giving campaign which has resulted in 32% increase in revenue. They are also participating in the IPromise program which will establish a 529 account for all kindergartners next year.
- Indianapolis Public Schools EF has had an interim executive director for the past 6-9 months and has created a pro athlete competition to help raise money. They've been using Bloomerang and BidPal to help with their work.
- Vigo County EF has received an \$83,000 estate gift from a long-time donor. They recently completed their grant cycle which had \$112,000 in requests and they were able to award \$80,000.

- Dearborn County Retired Teachers Foundation has had their program replicated by the state retired teachers association.
- Anderson EF helped fund their Calculus Club's competition at nationals where the club finished 3<sup>rd</sup> in the nation.
- Hamilton Southeastern SF has been shoring up its infrastructure and is working on its 5-year strategic plan.
- Avon EF tweeted about its school supplies program with a picture of kids with their supplies saying thank you and that tweet resulted in a company funding the supply program for a year.
- Carmel EF is in the middle of its Teacher Honor Roll program. Certificates and letters are given to the awarded teachers during Teacher Appreciation Week. It raises about \$10,000. (One EF does its recognition program around Valentine's Day. Several mentioned doing theirs twice a year including around Thanksgiving/the holidays.)
- Bartholomew Consolidated SF received a significant supply of a coffee-table book about Columbus to give away as they could. They have created a program where one receives a copy of the book for a \$50 donation. Also working a planned giving seminar for retired teachers that includes giving options to several organizations in the community.
- Hobart EF hosted a wine tasting with silent auction this year and raised \$20,000. They've tried a movie marathon showing Harry Potter movies starting at 10pm on a Friday through 10am on Saturday. Raised \$1,000; not ready to give up on it, but not as successful as hoped and required a lot of volunteer effort.
- Highland EF is up and running after a lot of formation work in the past year. They funded their first round of grants and hosted a trivia night event. Plan to give \$10,000 in grants this fall.
- Portage EF just finished their first Harlem Wizards event raising \$11,000 and surpassing their expectations. Wondering if similar results can be expected if continue Harlem Wizards event annually. Also did a wine/beer tasting last year. Looking to add a Major Saver campaign.
- Valpo EF did a Major Saver campaign in November and Harlem Wizards event in April. Planning a golf outing in June. Had 18 grant submissions this year. Support a Kids on Campus program that takes students to Notre Dame and Ivy Tech for college information/experiences.
- Munster EF is spending some time looking at its governance and bylaws and making revisions. Teachers' pay has been frozen since 2011. In the 2<sup>nd</sup> year of a 5-year grant supporting teachers' needs for the classroom. Have a Jeans and Jerseys fundraising tailgate event. Found success with a more casual dress/event. Do Honor an Educator twice a year.
- Hammond EF has succeeded in adding more diversity to its Board. Does a teachers award banquet in mid-March where they net \$22,000 and recognize outstanding educators, administrators and community members. Use college student interns, usually education majors, to help with administrative work for the foundation.
- West Lafayette EF has recently revamped its annual campaign and doing much more segmentation of its donors in asking for gifts. Changed from DonorPerfect to Bloomerang as their donor management system. Are planning phone calls to donors giving in 2015, but not yet this year (dividing the calls up among staff and board).

Parents in the district are opted-in to receiving Foundation news through school's messaging system at the time of school registration.

- Merrillville EF also uses Bloomerang system. They are looking to do a walkathon. Looking to increase the email addresses they have and needing new board members. Promotes their payroll deduction program to new teachers.
- John Glenn EF very new foundation that was created because they had a donor leave a home and its contents to them. Had a tag sale with the home's contents that raised about \$7,000 in addition to the sale of the home.
- Foundation of Monroe County Schools just completed its first GEMS program – a career expo and hands-on learning lab for 5<sup>th</sup> and 6<sup>th</sup> grade girls with a focus on STEM. Link to video is <http://www.mccsfoundation.org/2017/02/21/girls-in-engineering-math-science-gems/>.

### **Donor Recognition**

- Handwritten thank yous – a good job for Board members – are frequently done.
- Washington Township does a donor recognition event for those giving \$1,000 or more. Done at the District Tap and includes open bar. They really have 7-8 events throughout the year that this group of donors is invited to. Some donors prefer certain events over the others, so ends up being “something for everyone.”
- Lawrence Township does a donor recognition event in a Board member's home and the guests leave with a gift made by students.
- Washington Township's ED calls all first-time donors. Important for donor retention.

### **Annual Fund**

- Washington Township brings in about \$210,000/year
- Bartholomew raises around \$20,000/year
- Avon EF raises between \$8,000 and \$10,000 but this doesn't include the community breakfast they have to kick off the campaign each year on the Monday after Thanksgiving.

### **Marketing**

- Lawrence Township SF uses attendance at school board meetings as a chance to talk with vendors about supporting the Foundation.
- Vigo County does a teacher recognition banquet.
- Greenwood EF presents its grant checks at a school board meeting.
- Lawrence Township creates an album on Facebook to post event pictures.
- Pike Township have families opt-in to receiving Foundation information when registering students.
- Westfield presents plaques to teachers with their grant awards in their classrooms. These plaques are seen by parents coming in the classrooms. The superintendent went with the EF surprising teachers with grants and video was taken.
- Washington Township delivers a card that states the impact information of the Foundation to corporate sponsors.
- Washington Township is able to interview famous alum for a segment on its school's radio station.

- Brownsburg EF took the time to create a marketing calendar for the year which has been very helpful.

### **Advice for Hiring the First Executive Director**

- Start with something, even if it is small in terms of amount of time the foundation can afford and grow from there.
- Determine what's feasible now. It does cycle in that the more time you have someone dedicated to it, the more money you can raise.
- Resources for determining appropriate pay: Charitable Advisors annual salary survey, Central Indiana Community Foundation (CICF), CPA firms, INAPEF's biennial report.
- Assess in an interview a learned vs. innate skill and hire those with the innate skills

### **Gaming License**

- Several foundations are involved with events that require a gambling license. One person mentioned that Stella at the gaming license office for the state is a great resource.
- Some that have interest in this subject (for networking purposes) are: Monroe County, Highland, West Lafayette, Greenwood.

### **Miscellaneous Notes**

- Retired teachers are good volunteers to use in the schools.
- IPS is working to get packages developed for corporate sponsors to keep companies from getting multiple requests from the district. Many reported doing corporate giving through packages in part because it is easier for staff to manage.
- Hamilton Southeastern SF does a workshop with school groups to help explain the compliance requirements of 501(c)3 organizations.
- One foundation reported trouble setting up a LinkedIn account for the foundation because the LinkedIn system blocked the account because one had already been set up with the district's email domain, even though the new account would be for the foundation, not the district. Several suggested LinkedIn's corporate services can help resolve that issue.
- Check classmates.com groups – consider purchasing their email lists for your district.
- If you know anyone who works for Salesforce, not only do they have a supportive employee volunteer program, but the group volunteered for also gets a \$1,000 donation.
- Donor advised funds must involve a committee selection, not just the donor picking a recipient.
- Bartholomew Consolidated SF has bought name tags for every board member to wear especially out in the community when they go to events to help identify them as BCSF Board members.