

BOARD WORKSHOP

Monday, November 8, 2010 6:00 PM

Boardroom - Central Administration Office, 203 E. Oleander Ave., La Feria,
Texas 78559

I. Foundation Innovation Presentation

Board Secretary

Five keys to a successful school foundation

by Deborah Ward

Featured Funding News, Funding

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If you're looking for a way to create additional financial support and resources for your school district, you might consider starting a foundation.

Known as public school foundations or local education foundations, these organizations are, and should be, distinct from the school board and the district itself. In these days of budget cuts, rising expectations for schools, and decreasing tax revenues, foundations can provide a way to increase community participation through volunteer opportunities and stakeholder "buy-in" to your district.

According to the January 2004 edition of "Leadership Insider," a supplement to the "National School Board" Association's School Board News, local education foundations began to gain popularity in the 1980s as legislation limiting property taxes became more prevalent and districts were forced to find additional sources of funding. The current state of finances—declining tax revenues coupled with serious budget cuts—are once again making these foundations popular. The article in the supplement, entitled "Starting A School Foundation," says a recent study shows there are now more than 4,800 school foundations across the United States, and "they vary in terms of staff size, budget, and reach."

I contacted four individuals who are involved with education foundations to get their take on why now is a good time to start a foundation, what the biggest challenges are when starting one (no one said this is an easy process!), and what the role of education foundations should be. These individuals are:

- Ginny Lays, the executive director of the Greencastle-Antrim Education Foundation and a consultant to the Fannett-Metal Education Foundation in Fannett-Metal School District, both in Pennsylvania;
- Bob New, the president of the Educational Foundation Consulting Group, who works directly with school districts forming new and rejuvenating existing local education foundations; and
- Orietta Schneider, the grant researcher, and Lisa Spittal, the co-president of the Putnam Valley Education Foundation in Putnam Valley, N.Y.

All of these individuals agreed on the role of a local education foundation—to raise needed community support (often in the form of fund-raising dollars) for a school district.

They also agreed that a foundation can provide significant financial support for your school district. A well-developed, well-run foundation has the potential to provide \$50,000 or more in annual revenue from both cash and in-kind contributions—and often these contributions come with fewer strings attached than federal or state funding.

Foundations have other benefits as well. They can serve as vehicles to strengthen school and stakeholder relations, thereby making it easier for school leaders to win stakeholder buy-in for their education initiatives. They can provide volunteer opportunities (including fund-raising, planning, and board participation) for district parents and for people who do not have children, for example, and they can be channels for establishing or expanding school-business partnerships.

The experts I talked to identified the following five keys to starting and running a successful school foundation:

- **Keep the foundation separate.** Make sure you draw a clear line between the foundation itself and the district, its leadership, and its school board. Though the foundation will exist to advance the goals of the district, it's important for ethical and legal considerations to make a clear distinction between the two.
- **Plan thoroughly.** Everyone involved in the project must clearly understand the mission and goals of the foundation, so they can work toward achieving the same goals. It's a good idea to create a steering committee of individuals from varied backgrounds and with various perspectives to implement the planning stage of the foundation.
- **Choose your staff wisely.** To maximize the potential of your foundation, its staff should have some fund development experience and should not be expected to run the foundation on a shoestring budget. A common mistake is to appoint former teachers or coaches in leadership roles. Although they might have the requisite "people" skills and an understanding of education, they don't necessarily have the fund development skills to take the foundation in the right direction. Respondents all agreed that an effective fund development committee and board of directors will enhance a foundation's capabilities.
- **Invest in the foundation's success.** District leaders should look at the potential for a local education foundation 10 years down the road and invest now in the foundation's success by providing the appropriate resources, one expert advised.
- **Work together. Although separate,** foundations and districts must partner with each other to maximize the revenue that is raised and the positive impact it will have on students and teachers. Communicate frequently with district leadership to ensure that everyone is on the same page.

For more information about starting a school foundation, you can download the January 2004 issue of "Leadership Insider" by following the link below. You can also contact Ginny Lays via eMail at ginnylays@hotmail.com, Bob New at bobnew@suscom.net, and Orietta Schneider at pvschneid@optonline.net.

Deborah Ward, CFRE, is an independent grant writing consultant. She welcomes questions at (717) 295-9437 or Debor21727@aol.com.

Judy
 Board Workshop
 @ 6:00 pm
 Bid-Mtg @
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 for Nov. 8, 2010

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Foundation Innovation, LLC is a full-service consulting firm dedicated to guiding Education Foundations and school districts to success. Our team of consultants represents decades of combined experience in the nonprofit administration, development, marketing and training. As consultants, our goal is to create strong teams with powerful knowledge and tools to succeed.

* Dr. Milli Christner is a seasoned development professional with more than 15 years experience in nonprofit administration and K-12 philanthropy. Ms. Christner has served as the Executive Director of the Fort Bend ISD, Round Rock ISD and Hays CISD Education Foundations. She has a keen understanding of the relationship between the Education Foundation and the school district as well as the Executive Director and the Foundation Board. As an educator and administrator, Ms. Christner brings a wealth of knowledge and experience with the intricate workings of the public school system and community engagement. Ms. Christner received her doctorate through Texas State University, and currently serves as the president of Texas Association of Partners in Education.

* Laurie Cromwell began working in the non-profit field in 1984. In 1999, Ms. Cromwell was elected trustee of a local school district and served as President for three years. During this time, she was appointed President of a dormant Education Foundation and was an instrumental partner in its revitalization. Success was realized in less than six months. Ms. Cromwell's experience as a lead administrator in a non-profit organization, current owner of a for-profit corporation, Trustee and Foundation President bring a unique perspective of philanthropic issues. Non-profit management, administration and event expertise; understanding of corporate mentality of monetary giving; and cooperation necessary for Education Foundations and school districts are unique perspectives vital to establishing, jump-starting or fine tuning an education foundation. Ms. Cromwell was elected Citizen of the Year in 2002 and serves as member of a local Chamber of Commerce.

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Establishing An Education Foundation – You begin with a 501 (c)(3) IRS designation, which establishes a vehicle for donations to the school district. Directly, funds can be solicited for specific purposes such as innovative teaching grants, technology, academic achievement programs or recognition of excellence in teaching. The indirect benefits can be even greater - an Education Foundation creates an atmosphere of collaboration among the school district, business leaders and the community. *Foundation Innovation, LLC* can help you establish an effective Education Foundation using nationally recognized and proven methods. [Back to top](#)

Jump-Start An Education Foundation – An effective Education Foundation requires a road map for sustainability. In many school districts, the 501 (c)(3) designation is accomplished with the greatest intentions, but after a time the enthusiasm levels off or dwindles. Synergy among the Foundation board, superintendent, school board and community may wane; focus is dimmed. *Foundation Innovation, LLC* will show you how to bring your existing Education Foundation back to life with new energy, enthusiasm and success. [Back to top](#)

Executive Director Search – It is critical that your Education Foundation and Executive Director be the right match. Administrative responsibilities must be handled efficiently, effectively and professionally. *Foundation Innovation, LLC* coordinates the search process by working with your Foundation to formulate the criteria, posting and selection of an Executive Director. *Foundation Innovation* currently has a network of professionals currently serving as non-profit or Education Foundation administrators. [Back to top](#)

Event Planning – Special events can define an Education Foundation, and well-planned and executed events promote the image and purpose of the Education Foundation. Successful fund-raising galas can bring in a major share of the Foundation's annual drive. Academic recognition banquets can remind the entire community of the value of a district's teachers and students. *Foundation Innovation, LLC* coordinates a unique celebration that will promote a positive image for the Education Foundation, school district and community. [Back to top](#)

Marketing Materials That Count – Image is everything. Your marketing materials should grab the attention of potential donors. Since your Education Foundation rewards innovative thinking in the school district, it is imperative that the marketing strategy and collateral be innovative. Fundraising is not a new concept to community, businesses or vendors; most are requested to donate funds on a routine basis to a variety of causes. The new concept is innovation—fresh, dramatic marketing materials that jump out in front of competing interests. *Foundation Innovation, LLC* can help you design a fresh, creative and recognizable image for your Education Foundation. [Back to top](#)

- Logo Development
- Video Production
- Website Development
- Brochures, Letterhead
- Newsletters
- Press Releases

Grant Process – Innovation is what sets an Education Foundation apart from other fundraising efforts. Employees, parents and community members collectively celebrate the raising and allocation of funds to directly benefit students. A grant program provides the framework for donations to be earmarked for innovative educational programs. *Foundation Innovation, LLC* expertly coordinates all aspects of the grant process such as establishing funding priorities, the application process, grant writing workshops, online chats, grant selection and finally grant presentation. [Back to top](#)

Board Development – An Education Foundation is as effective as its Board of Directors. An enthusiastic, engaged Board can guarantee a successful Foundation, so developing the Board is a critical skill. *Foundation Innovation, LLC* assists in the development of a Plan of

Action, from every aspect including bylaws development, committee and board structure, selection and training of board members and sustainability through effective leadership. [Back to top](#)

Strategic Planning – Sustainability of leadership, increased awareness, and higher levels of giving are important discussion and action topics for an effective Education Foundation. This comes through systematic planning and modeling of proven results. Successful Education Foundations should review the activities and strategies annually. *Foundation Innovation, LLC* provides hands-on enthusiastic strategic planning that will entice more involvement from your Board of Directors. [Back to top](#)

One-Day Assessment – Is your Education Foundation connecting with the community, recognizing and improving academic achievement, boosting morale and relaying a positive image for your school district? *Foundation Innovation, LLC* provides a one-day assessment of your existing Education Foundation, followed by written recommendations for making your Foundation more effective. This documentation will serve as the road map to address specific areas and recommendations to maximize effectiveness. [Back to top](#)

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