Public School Education Foundations

February 10, 2020
Sycamore Advisory Commision

Frank | Eric | Vinit | Charlie | Michelle | Neil | Andy

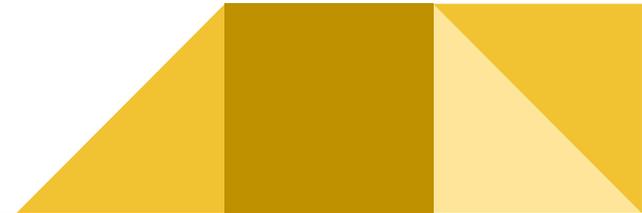**Approach and Overview**

PSEF Landscape

Recommendations

Approach and Overview

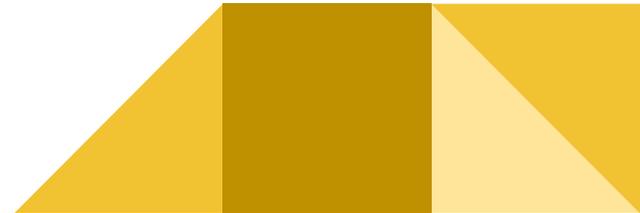# Public School Education Foundations Overview

Sample Mission Statement

To privately fund and support programs, materials, and opportunities that maintain, strengthen or enrich the students' environment and educational experiences

Public School Education Foundations Overview

- A grant-making entity that supports educational activities
- Required to comply with IRS regulations to enjoy tax favored status
- Separate legal entity from the public school system
- Typically governed by a Board of Advisors and employing an Executive Director
- Typically funded by public support, individuals and businesses
- Key activities include cultivating donors, managing grant requests, and building a culture of giving

Summary of Project

- Identify best practices of private and public schools that have vibrant and sustainable foundations to support specific educational projects

- Apply learnings from these institutions and other resources to Sycamore to create an outline of a model to establish and maintain a successful foundational for the benefit of the Sycamore community
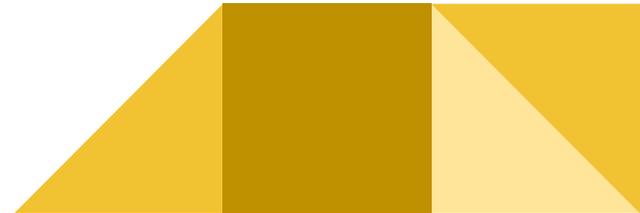
Guiding Questions

1. What local and regional districts, both private and public, currently have highly functioning foundations?

2. How are these foundations managed from a personnel perspective?

3. How are specific projects determined for support?

4. How are funds raised raised for the foundation?

5. How have the most successful foundations been sustained?
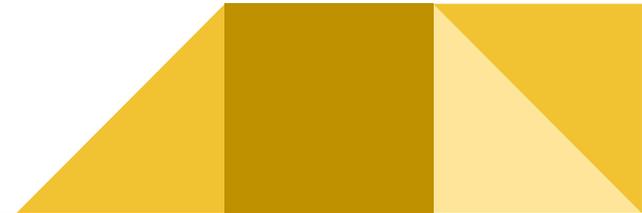
PSEF Landscape

Which current local and regional districts, (private and public) have highly functioning foundations?

Indian Hill Foundation

Madeira City Schools

Walnut Hills High School

Kilgour

St. Xavier High School

Rocky River City Schools

Dayton Public Schools

Upper Arlington Education Foundation

Maumee City Schools - Panther Pride Foundation

Bexley Education Foundation

Saint Ursula Academy

The Seven Hills School

The Summit Country Day School

The Greater Cincinnati Foundation (community resource)
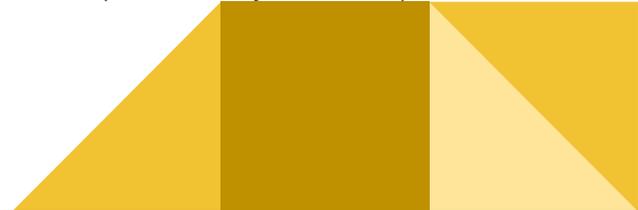
Case Study #1 - District similar to Sycamore with established foundation

Foundation
- Established 1985
- $3 million is assets (most in designated funds)
- Disburse $100,000 + per year
- Supplements school budget
- **Includes Alumni organization**

Organization
- **Full-time, professional, Executive Director**
- Full-time, professional, Asst. Executive Director
- Collaborate with Principals and Chief Academic Officer
- **Board of Advisors**
    - Includes Superintendent, no vote
    - Includes Board of Education rep w/vote
    - Includes
    - Executive Committee
    - Grant Committee
    - Development Committee

Development
- **Culture of giving**
- Partner with booster groups including allocation of development funds
- ED and Asst. ED are connectors in community
- Annual fundraiser
    - Casual
    - Business sponsors
    - 1,200 - 1,500 attendance
    - $130,000 net revenue
- Annual campaign, business and individual
- Support from all contractors involved with capital improvements

Operations
- Offices based in District offices
- eTapestry for donor management
- Quickbooks

Case Study #2 - A local relatively new School foundation

Foundation
- Established 2001
- $1.7 million is assets
- Disburse $203,000 + per year (2019)
- Supplements school budget
- **Includes Alumni organization (merged in 2012)**

Organization
- Full-time, professional, Executive Director
- Additional FTE - 5 PT resources in Marketing, Tech, Sales)
- Collaborate with Superintendent and Board
- **Board of Advisors (19)**
  - Includes Superintendent
  - Additional members of other District Orgn
  - Alumni Representative

Development
- Started as parent initiative.
- School provided Space and old Technology equipment.
- Strong Parental connection with current and past students that volunteered more than 4800 hours last year.
- Over $76,000 granted for Classroom Innovation Programs
- Suggestion Boxes in schools are reviewed for monthly funding ideas by Board and Superintendent.
- Recent Completed fundraiser largest - (Fund of $3 million) Extensive preparation for the past 2 years.
- Alumni initiatives including Awards for Alumni

Operations
- Offices based in District offices
- Razer Edge Software - Recognize frequent mailings to stay in touch with alumni and donors.

How are these foundations managed from a personnel perspective?

Many successful foundations started as volunteer and moved to paid staff

Foundation are managed by volunteers or full time staff or combination of both

Other Paid staff - Executive Director. Staff will coordinate school volunteers.

An executive director will typically be an experienced school fundraiser that is highly skilled and is a high paying position.

Our research clearly indicated that foundations that utilized paid staff were considerably more effective as raising funds than volunteers
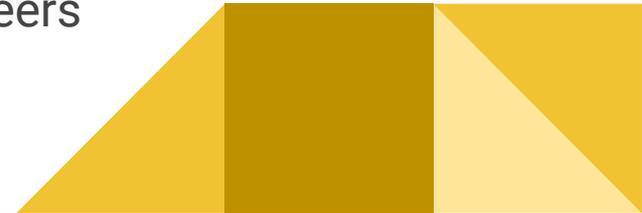
# How have the most successful foundations been sustained?

Culture of giving

Organization of teachers, current students, and parents plan and execute events to generate funds and keep contact lists current this also sustains the culture of giving

Technology

Technology helps find high net worth alumni, keep all alumni contact lists current, constantly be in contact with alumni

Talented experienced high skilled staff
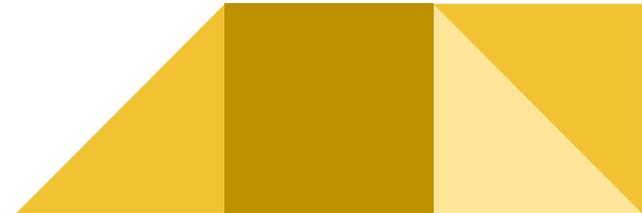
How are specific projects determined for support?

Collection of ideas

Multiple methods; important factors are clarity of process & coordination with district stakeholders.

One foundation uses Suggestion Box in schools for teachers and Administrators. Another uses a grant submission form. Superintendent can identify. Foundation Board approves and manages requests.

Choices for funding

**Established Foundations have a Grant Committee.**

Collaborating with school leadership, a new grant funding process will be a catalyst for innovative initiatives

Consideration: Ecosystem of organizations - the foundation is intended
to enhance the sources of funding for good projects
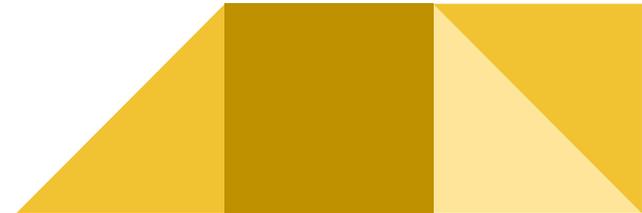
How are funds raised for the foundation?

- **Annual Events** for Alumni and other potential donors
- **Campaigns** gather contributions by Parents of Current and past students
- Local Businesses.
- **Wealthy Donors**
- Contact with Alumni - to raise awareness in the community and engaging donors.
- District may provide a portion of the funding in accordance with Ohio law.
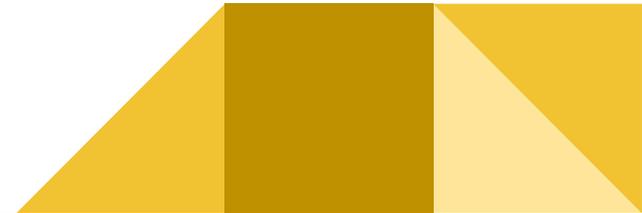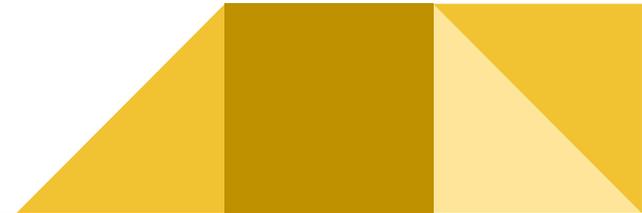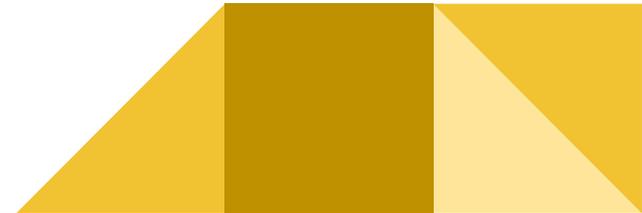
Recommendations

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We recommend that the Sycamore Community Schools take steps to promote and establish an education foundation

We suggest that current alumni activities (SAFA) be combined into that Foundation

Commitment

Rather than report our recommendations and then just go away, this Committee offers to work to **develop a working model** of the proposed **Sycamore Education Foundation**, and report that model to the School District **within the next two months**, and even beyond that timeframe, **cooperate with the District** in establishing the Foundation.

Questions