

2019 NSFA NATIONAL CONFERENCE WORKSHOPS

BOARD DEVELOPMENT / GOVERNANCE TRACK

A1 Level One (newer education foundation or foundation leader) Best Practices Building and Developing your Board

Amy Stuursma, Executive Director- East Grand Rapids Schools Foundation

The focus of the presentation is best practices in building a board that supports your mission. A board that is clear in their role will increase the impact and awareness of your Foundation. This presentation touches on how to select and seek out board members who support your mission, identifying the players in your organization and the roles they all play as well as the partnership with the district. We will also look at characteristics of a strong board and how to communicate with your board so that they continue to stay engaged in the good work of the foundation.

C1 Level Two (suitable for either) It's All About Planning!

JoAnn Perotti, Director of Strategic Services & Executive Director of the Bucks IU Education Foundation- Bucks County Intermediate Unit (Education Service Agency)

This workshop will present the importance of developing a reality- based Strategic Plan for your Education Foundation. Participants will receive the 30,000 foot overview of the process of how a plan is developed and implemented. This inter-active and engaging presentation will engage them in the process of strategic planning. They will leave the presentation with a better understanding of the importance of developing goals, strategies, action plans and measurable objectives for implementing the plan. Handouts with tips will also be provided.

B8 Level Two (suitable for either) It's Not About the Money: an Austin Growth Story

Michelle Wallis, Executive Director- Austin Ed Fund

Milli Christner, Director of Resource Development-Austin Ed Fund

The Austin Ed Fund has been around for 25 years but the board's engagement has varied with every leadership and staffing change. Learn how a laser focus on deepening board's work and engagement has resulted in millions of dollars to support school district priorities. We will share specific strategies used to involve board members in every part of the donor's cycle.

C8 Level Two (suitable for either) Managing through Challenging Times - Superintendent Transition

Wayne Padover PhD, Professor of Educational Leadership- Sanford College of Education, National University

Superintendent transitions are inevitable given the average superintendent tenure of 3 years. What can your education foundation do to prepare for and maintain continuity during this critical leadership transition? In this interactive workshop, the presenters will discuss: a) How to

be a good partner i.e. how to align with key district stakeholders and develop effective communication strategies, b) establishing formal and informal working agreements prior to your current superintendent's departure, b) what you can do to help attract superintendent candidates who are supportive of education foundations, d) strategies you can use to gain input into the superintendent search process, e) how to orient the new superintendent and f) how to get on the same strategic page with the new superintendent.

B1 Level Two (suitable for either) Strategic Planning - Charting Your Course for Success

Regina Neu, Nonprofit Consultant- Neu Consulting
Patty Cowan, CEO-Coronado Schools Foundation

This workshop will provide an overview of strategic planning for an education foundation. The presenters, a strategic planning consultant and an education foundation chief executive, will present a typical strategic planning process and format, using as a case study the strategic plan that was developed for and with the Coronado Schools Foundation board of directors and staff. Topics to be covered include: learnings from the process, what is necessary for the process to be successful, what were the takeaways from doing a strategic plan (i.e. how did it impact the organization, the board, and the structure and programming focus), what some of the challenges were during the process and things to consider once the plan is completed (i.e. accountability). We will provide examples of completed strategic plans, templates, and a beginning strategic planning activity for participants, with ample time for group discussion and questions.

D1 Level Two (suitable for either) Working as Collaborative, Strategic Partners

National Superintendent of the Year Award Winner and their Executive Director

Want to know what goes into a successful Foundation and District relationship? Learn from the award winning Superintendent of the Year and the Foundation's Executive Director the formal and informal working agreements that allow them to effectively collaborate, communicate and maintain a strategic alignment.

FUNDRAISING TRACK

B2 Level Two (suitable for either) Be Intentional: Building a Resource Development Plan

Peter Kelly, President- Boston Latin School Association
Nicole Dumas, Director, Alumni Engagement & Philanthropy-

Whether you're a one-person show or part of a larger team, your best work will flow from a coordinated fundraising approach. Annual fund, major gift and capital or comprehensive campaign programs are all mutually reinforcing, but without good planning and integration you might be sub-optimizing your results. In this session, we'll discuss how sound resource development planning can advance your organization's fundraising outcomes.

A2 Level Two (suitable for either) Business and Corporate Engagement Strategies Panel

Mary Melon, *President & CEO- Foundation for Oklahoma City Schools*

Mike Snyder, *Executive Director-Claremont Mesa Education Foundation /Claremont Chamber*

Trish Garlock, *Former Executive Director- Mill Valley Schools Community Foundation dba Kiddo!*

Corporate and Business relationships are much more than a transactional relationship. Join this panel of education foundation leaders from Oklahoma City, Mill Valley and San Diego to learn the strategies they took to engage their business community in meaningful partnerships which are providing significant dividends for their foundations.

C6 Level Three (experienced education foundation or foundation leader) Capital Campaign Basics- Get Ready for your Future

Debbie Sontupe, *President, Match Nonprofit Consulting & Executive Director of the Morris Educational Foundation- Match Nonprofit Consulting & Morris Educational Foundation*

Molly Servais, *Senior Consultant, Match Nonprofit Consulting & Board Member of the Morris Educational Foundation-Match Nonprofit Consulting & Morris Educational Foundation*

Have you been considering approaching your district about partnering with them to do a large capital project to benefit your students? Have you been considering bringing the idea to your board of directors? This workshop outlines the foundation needed to embark on a capital campaign for your district and the basics of campaign planning and execution. From doing a feasibility study, writing a case for support of the project, recruiting the right leadership, working with your superintendent and Board of Education, cultivating leadership gifts, keeping the campaign moving, engaging volunteers and running a community campaign, this workshop will walk through the fundamentals of capital campaigns from A to Z.

D3 Level Two (suitable for either) Channeling Higher Education: Lessons from University Fundraising

Debbie Sontupe, *President, Match Nonprofit Consulting & Executive Director of Morris Educational Foundation- Match Nonprofit Consulting & Morris Educational Foundation*

Molly Servais, *Senior Consultant, Match Non Profit Consulting & Board Member of the Morris Educational Foundation-Match Non Profit Consulting & Morris Educational Foundation*

Michelle Wallis, *Executive Director- Austin Ed Fund*

Milli Christner, *Director of Resource Development- Austin Ed Fund*

Colleges and Universities have been far more successful at education philanthropy than K-12 education foundations. Why? What are they doing that we should be doing? In this workshop, you will gain greater insight into the successful college and university fundraising model and how you can apply it to your education foundation. Topics will include major gifts, alumni engagement and leveraging the experts within your schools to help you engage donors. Then you will hear about how Austin, TX has been taking notes. Hear how the team expanded the reach of its education foundation and transformed its work and structure into a college or university style development office that in just 5 short years has raised over \$55M, supporting

innovation in Austin ISD. Learn more about Austin's development, lessons learned and why there is a gong in the office!

B6 Level Two (suitable for either) Crowdfunding Best Practices for School Foundations

Kirk Smiley, Principal Director, Advocacy and Public Partnerships- DonorsChoose.org

Mary Melon, President & CEO-Foundation for Oklahoma City Schools

As crowdfunding becomes an increasingly popular and viable form of fundraising, how can school district foundations make sure they maximize the benefits, leverage donations from outside their community, align with their districts' policies and guidelines, protect student privacy, and avoid any safety or legal concerns? Learn about the best practices for effective K-12 crowdfunding as published by organizations like AASA and NSBA, the questions you should ask before implementing a program, success stories from peer foundations, and what resources already exist to get you started. The presentation will feature case studies and first-hand experience from multiple district foundation guests including Mary Melon from the Foundation for Oklahoma City Schools.

A5 Level Two (suitable for either) Demystifying the Major Gift Campaign

Karin Cox, Hartsook Co-Founder and Senior Executive Vice President- Hartsook Companies, Inc.

Research shows that 90% of gifts come from 10% of donors, and the largest portion of giving-by far-comes from individuals, not foundations or corporations. This is why it is so important for nonprofit to know how to properly identify, qualify, cultivate and solicit prospects. Preparing for a major gift campaign requires an organization to undergo a strategic assessment and develop a comprehensive vision for the organization's future. An organization needs to know how to answer these questions: "When is the right time for a campaign?" "Based on our mission and vision, what are our campaign goals?" "How much can we raise and how long will it take?" This session will offer proven insights and strategies every nonprofit needs to know in order to be adequately prepared for a successful campaign-from ensuring the organization is ready internally with the proper infrastructures in place, to its ability to complete a campaign successfully through external, objective assessments.

C2 Level Two (suitable for either) Donor Acquisition Strategies to Get More \$

Ami Becvar, Account Executive- Blackbaud

Josh Bucy, Communications and Database Manager, Central High School Foundation

Successful foundation leaders understand the latest fundraising strategies to grow your donor base to drive fundraising revenue and grow your mission. This session will provide insights from fundraising thought leaders with tips and tricks that you can implement at your foundation to get more dollars in the door. Learn about innovation in peer-to-peer fundraising, donor insights and wealth analytics. Is updated constituent data keeping you up at night? We hear you! Walk away from this session with action items that you can take back to your foundation for immediate impact!

C3 Level Two (suitable for either) Earned Income Strategies Panel

Michelle Ginn, CEO- Carlsbad Educational Foundation

Patty Cowan, President & CEO-Coronado Schools Foundation

Joanne Couvrette, Executive Director- Canyon Crest Academy Foundation

How do you create a sustainable source of revenue for your Foundation? Education Foundations are increasingly turning to earned income instead of simply relying on contributed income. In this workshop, learn how the Coronado Education Foundation, the Canyon Crest Academy Foundation and the Carlsbad Educational Foundation collectively raise millions of dollars annually from earned income strategies including: K-8 Enrichment Programs, Boost Academy Classes (9-12), Before and After School Child Care, Camps and Clinics, Licensing Facility Use, Graduation Photography, and more.

A3 Level Two (suitable for either) Retaining Donors - Secrets to a Successful Stewardship Campaign

Krista Berry Ortega, - Sanford Institute of Philanthropy

B3 Level Two (suitable for either) The Hidden Power of Donor Surveys

Jay Love, Chief Relationship Officer- Bloomerang

As fundraisers, we sometimes suffer from a lack of curiosity about our donors. So many of our donations are from people who we know very little about. And even our longest-running donor relationships continue despite not knowing how they feel about the relationship. The good news is that research shows that donors actually like it when we ask them questions about themselves and how they feel about our organization. Knowing that information can also be invaluable in guiding our donor communications efforts. Whether you're just now discovering the power of donor surveys, or you're looking to up your game, this session is for you!

D4 Level Two (suitable for either) Turning Philanthropic Trends into Opportunities

Laurie Cromwell, CFRE, President- Foundation Innovation, LLC

Education foundations that support public school systems have unique opportunities to engage donors, but many times do not take a methodical approach. In order to be a successful fundraising organization, you need to know your donors and the best ways to engage them and align that approach with philanthropic trends. Charitable giving data is released annually, as well as projected trends. Learn what trends are expected, how giving to education has changed, and best practices to engage your donors based on these trends. These specific techniques include giving by each generation and the unique opportunities to

utilize these trends in giving to the increase funding, develop investors and methodically develop a plan of work through a sustainable giving program.

D2 Level Two (suitable for either) Unique Fundraising Ideas Panel

Abby McNulty, Executive Director- Park City Education Foundation

Clayton Ramick, Executive Director-Moore Education Foundation

Are you looking for unique fundraising ideas to implement which bring both financial resources and community awareness to the foundation. Park City hosts Running with Ed (RWE), a 38-mile, 10 leg race traversing Park City, featuring 1,500 runners, 100+ volunteers, sponsors, fundraising partners, and generous donors, raising over \$240,000 for PCEF. The Moore Public Schools Foundation has found a unique fundraising opportunity outside of events and monthly donors that appeals to businesses and marketers. They sell adds on the elementary students homework folder, netting over \$36,000 in our second year and generating significant awareness for the Foundation.

MARKETING AND COMMUNITY ENGAGEMENT TRACK

B4 Level Two (suitable for either) Alumni Engagement: Many Paths, One Spirit

Michele Roberts, Executive Director- Central High School Foundation

Josh Bucy, Communications and Database Manager-Central High School Foundation

Sydney Davidson, Events and Alumni Relations Manager- Central High School Foundation

Jim Burgraff, President- Alumni Nations

In this workshop, you will learn from alumni specialist, Jim Burgraff, 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). The Central High School Foundation staff will then show you how to ensure that your institution doesn't forget its past, continues to live successfully in its present, and is planning for its future by engaging alumni with Communications, Events, and Fundraising.

C5 Level One (newer education foundation or foundation leader) Go Get Those Corporate Dollars!

Stephanie Maxwell, CFRE, Executive Director- Mountain Brook City Schools Foundation

"Go get those corporate dollars!" Have you heard that before? We all have.

The number of nonprofits appealing to corporations are growing, but the number of corporations willing and able to contribute are not. This makes a fund development professional's job more challenging, but not impossible. Business community engagement

isn't limited to event sponsorship levels. It's a living, growing component of an overall development plan that can provide bigger, more rewarding opportunities for your foundation. Corporate support comes in many fashions from event sponsorships and in-kind services, to annual giving, and even alumni involvement and support. Strategic research, effective methods, leveraged relationships, and a strong proposal spell success. Experience research ideas, successful samples, practical exercises, and suggested talking points, to implement when you return home.

B5 Level Two (suitable for either) *Discovery Your Story, THEN Change the World*

Dan Davis, Founder & CEO- *Stiry*

Each participant will walk away with the ability to connect experiences from their own story that allow them discover their own potential, their 'why', and how it is connected to their cause. In turn they will learn how to peel back the layers of their own story, connect their personal mission in life with their organization's mission, and subsequently be able to share that story and mission more effectively to internal teams, donors, and partners in an emotionally powerful way. No longer will they think of storytelling as a list of chronological events. They'll use it as their most effective tool to motivate those around them to participate, donate, and support the cause like they've never done before.

A4 Level Two (suitable for either) *Hashtags & Haberdashery: More Social Social Media*

Jeannine Cook, Communications Consultant- *The Fund for the School District of Philadelphia*

Hashtags & Haberdashery: More Social Social Media is an interactive session designed to support participants with creating a simple marketing and communications plan that engages donors both online and off. This workshop encourages participants to consider ways that they can be more social on social media. Participants will analyze several of The Fund for the School District of Philadelphia's social media marketing campaigns-and gain a greater understanding of how to use social media as a tool to ignite city-wide conversations and donations. Participants will then work together to design creative and out of the box campaign ideas and finally learn the elements of an effective communications plan. Groups will present to one another in a speed dating format and get feedback on ideas from the facilitator and each another.

C4 Level Two (suitable for either) *Marketing, Branding, Engaging*

Laurie Cromwell, CFRE, President- *Foundation Innovation, LLC*

One of the biggest challenges we face many times for our education foundations is awareness. Is your foundation the best kept secret? Most of us have limited staff and time to not only create, but execute a marketing plan. In this session, we will explore simple ideas to develop

an outreach plan that will brand your organization as well as engage your donors. Get up to date on technology tools to help your nonprofit get noticed and to make your organization more efficient.

A8 Level Three (experienced education foundation or foundation leader) *When Disaster Strikes: LEF Roles in Responsiveness*

Mary Chance, *President- Consortium of Florida Education Foundations*

Tracy Burger, *Director of Programs-Consortium of Florida Education Foundations*

During the hurricane seasons of 2017 and 2018, Florida was hit hard by major storms-Irma in 2017 as Category 4 in the Keys and then again as Category 3 in Marco Island on the mainland, and Michael in 2018 as near Category 5 and the strongest on record to hit the Florida Panhandle. Communities in these storms' path were heavily impacted including schools, teachers and students disrupted with school damage and closings and families' home life upended due to personal losses and devastation. Schools were also impacted during the 2017-18 school year due to an influx of students from Puerto Rico and the Caribbean Islands after Hurricane Maria ravaged those islands and a school shooter killed 17 lives at Marjory Stoneman Douglas High School in Broward County. Join this presentation on how Florida's local education foundations and the statewide membership network responded to these tragedies, what they learned and how they are preparing for future disasters.

D5 Level One (newer education foundation or foundation leader) *The First 3 Years: Collaborating to Maximize Impact*

Alicia Lingane, *President- Yorkville Educational Foundation*

Kristine Liptrot, *Director of Communications and Community Engagement-Yorkville Educational Foundation*

Starting an educational foundation from scratch is hard work! Learn how Yorkville Educational Foundation was able to supercharge their results by creating key collaborations. When our Foundation was established in 2015, neither our Board or our District Administration had experience running an educational foundation. In 18 months we went from collecting the first donation to raising \$30,000+ district wide (appx 600 students). There were two key collaborations that allowed the Foundation to succeed: a close relationship between the Superintendent, Dr. Tim Shimp and Director of Communications, Kristine Liptrot, and a mentorship with an established educational foundation, A+ Foundation of Aurora. Newly established foundations will learn how valuable these collaborations can be, and how they can maximize their impact. Attendees will learn how to create a road map for their Board, engage the community, and scale first year programs so they can blossom into major fundraising events.

D7 Level Two (suitable for either) Re-ignite, Re-imagine, Re-start

Veronica Figoli, *President & CEO- Denver Public Schools Foundation*

Demesha Hill, *Managing Director- Janus Henderson Foundation*

Dana Ortiz, *Strategic Resources Manager, Imaginarium, Denver Public Schools' Innovation Lab*

Amy Keltner, *Deputy Chief Schools Officer, Denver Public Schools*

Lessons from a Public-Private Partnership. Denver Public Schools (DPS), DPS Foundation, and Janus Henderson Investors formed a public-private partnership to have a deep and meaningful impact on student achievement and the quality of teaching in our home community. But in 2016, Janus Henderson became frustrated with their return on investment and their inability to serve as a thought partner when the projects they helped fund were failing and considered ending the ten-year partnership. Learn how the team collaborated to reignite the relationship, spur innovation, more fully engage employees, better leverage Janus Henderson's resources and become an exemplar for public private partnerships to dramatically improve student outcomes.

D8 Level Two (suitable for either) Strategically Engage and Mobilize Your Alumni

Jeff Stein, *Project Director- Future First USA / AlumniToolkit.org*

Your alumni are a powerful resource. They're your school and educator success stories. 73% of college-going students attend locally, 63% pursue their careers in state, and 36% would be willing to share their college, career, and networks with their former schools- if they were asked. But few schools or foundations have alumni programs that actively, and systematically, engage alumni. The Alumni Toolkit is a next generation alumni program- specifically designed to make it easy for foundations, schools and educators to reach, engage, and mobilize alumni as the community partners, program volunteers, and student influencers they need to succeed. This session will feature examples of foundations and educators who utilized the Alumni Toolkit to provide their schools, and educators, with alumni role models, college advocates, career partners, project-learning supporters, tutors, mentors, committee members and funders for their students. You can too.

OTHER: FINANCIAL MANAGEMENT TRACK

A7 Level Two (suitable for either) How to Reduce Your Liability and other Insurance

Jamie Fagan, *President- AIM Insurance*

Injuries, theft, property damage and other issues can result in lawsuits that may ruin your organization financially. Join us to learn how you can reduce your liability as a staff or board member on behalf of your organization. Also learn how to determine what limits you should carry? Lastly, you'll receive an overview on the new NSFA Member Benefit, a discounted insurance plan for D & O, General Liability, Property and Crime (Bonding). Bring your questions, we'll leave plenty of time at the end for you to ask them.

PROGRAM TRACK

C7 Level Two (suitable for either) Tackling issues of Equity & Equality in Education

Trisha Garlock, Board President- SchoolsRule-Marin

Kim Lund, Executive Director-Bellingham Public Schools Foundation

TBD , - All Hands Raised – Portland, OR

Education foundations can play a powerful role in ensuring every student has equitable access to opportunity and the chance to meet their unique potential. Some foundations are more intentional than others in their focus on equity and equality. Join us to learn about three groundbreaking efforts to better ensure that foundation resources are shared with those most in need and not just by zip code.

D6 Level Two (suitable for either) Elevating All Paths: Career Readiness Initiative

Danielle Grant, President and CEO- AchieveMpls

In this session, you'll learn about the Career Readiness Initiative, an expansion of our Career and College Center programming providing targeted career guidance, resources and industry connections for high school students who want to pursue career paths that do not require a 4 year degree. CRI was created in response to the needs of students seeking high-demand, family-supporting careers that can be accessed more quickly after high school, and the needs of Twin Cities companies struggling to find skilled workers and build their workforce pipelines. CRI enhances and expands post-secondary planning resources available to students; recognizes the value in every path to success and empowers each student to pursue the opportunities that best suit their individual career aspirations; and helps students identify their career interests early in high school to create the best path for their career goals, including 2 and 4 year degrees, technical school, certificate programs or apprenticeships.

B7 Level Two (suitable for either) Programs Making a Difference for Students Panel

Jennifer Henderson, Executive Director- Boise Public Schools Foundation

Carola Barton, Executive Director-Carmel Education Foundation

Ashley Sine, Executive Director- McKinney Education Foundation

Are you curious about the types of programs that other foundations are funding which are innovative and providing a good return on investment for foundation donors? Join this panel discussion to learn about these innovative student programs. i.e. In Boise, Idaho, Community Schools are both a place and a set of partnerships between the school and community resources. An integrated focus on academics, health and social services, community development and community engagement leads to improved student learning, stronger families and healthier communities. Learn about a program that is working to empower student advocates in Carmel, CA, Scholarship Counselors that are leveraging millions of dollars in post secondary support for students in McKinney, TX and more.

A6 Level Two (suitable for either) **Student Mental Health - A Community Response**

Gail Rothman, Executive Director- Decatur Education Foundation

Meagan Berardi, Director of Community Engagement-Decatur Education Foundation

Kim Akeley-Charron, Executive Director- Thompson Education Foundation

In 2016, a recent Decatur High School Graduate lost his battle with addiction and our community was consumed by grief. Out of that tragedy, a mission was born to remove the stigma that exists around the mental health challenges and substance abuse our kids are dealing with. We will share the story of Joe's Fund and the birth of a partnership between the Decatur Education Foundation and City Schools of Decatur to create a holistic student center so that ultimately every child can connect to resources to address their social and emotional health. We hope that by sharing this story, other foundations will be able to more proactively address the serious mental health issues facing our kids.

SCHEDULE

Tuesday February 12 | 11:00 AM – 12:15 PM | Session A

Tuesday February 12 | 1:30 PM- 2:45 PM | Session B

Tuesday February 12 | 3:45 PM – 5:00 PM | Session C

Wednesday, February 13 | 11:00 AM – 12:15 AM | Session D