



Western Regional Conference

PIVOT- Adapting in a Changing World

November 30, 2017 from 9:00 AM to 4:00 PM
Puget Sound ESD - 800 Oakesdale Ave SW, Renton, WA 98057

AGENDA

- 8:30 – 9:00 **Registration, Continental Breakfast and Sponsor Booths Open**
- 9:00 – 9:05 **Welcome**
– Carmin Dalziel | Executive Director, Northshore Schools Foundation
- 9:05 - 9:20 **Opening Remarks**
– Dr. Susan Enfeld | Highline Schools Superintendent
- 9:25 – 10:05 **Keynote- What is Your Impact? Using “theory of change” to help your foundation identify and measure intended outcomes**
– Jennifer Beyers, PhD | ORS Impact
- 10:05 – 11:05 **Keystone Panel Discussion- How do foundations and districts work together for maximum student and school impact (superintendents, school board members and foundation leaders)**
– David D'Souza | Mercer Island School Board President
– Donna Coloski | Mercer Island School District Superintendent
– Cliff Sharples | Mercer Island Schools Foundation Co-President
– Penny Yantis | Mercer Island Schools Foundation Executive Director
– Kristie Dutton | Everett Public Schools Foundation Executive Director
– Dr. Molly Ringo | Executive Director K-12 Education, Everett Public Schools
- 11:05 – 11:15 **Break**
- 11:15 – 12:15 **Workshop Sessions One**
A. **Developing a Board that Works-** How to recruit, train and retain board members and engage them in meaningful work. Those with

staff will also gain insight into the importance of a strong relationship between a Board Chair and Executive Director and how to ensure it stays that way.

- Kristin Behn | Issaquah Schools Foundation Immediate Past Board Chair
- Matt Coyne | Issaquah Schools Foundation Board Chair
- Liz Swanson | Issaquah Schools Foundation Executive Director

B. Social Media Success- *Which social media platforms are best to reach your audience? We'll cover how to identify which platforms will bring your work the best return and engagement, how to grow your target audience and how to prioritize social media in your work.*

- Audrey Tanberg | The Fearey Group, Senior Social Media and Digital Strategist

C. Revenue Growth Strategies- *Learn the path the Foundation for Edmonds School District took in growing from \$40,000 to one million in seven years by adding Major Gifts, an Annual Fund, Special Events, Grant Writing and Alumni Engagement.*

- Deb Anderson | Foundation for Edmonds Public Schools Executive Director

12:15 – 1:15

Lunch

A. National Trends for Education Foundations- Robin Callahan | NSFA Executive Director

B. Networking with Your Colleagues

- Foundation Board with staff
- Foundation Board with no staff
- Board Chair with staff
- Board Chair with no staff
- Executive Director with 1 or 2-person staff
- Executive Director with 3 or more staff
- School Board Member
- Superintendent
- Development Staff
- Other Foundation Staff

1:15 – 2:15

Workshop Sessions 2

A. Supporting Academic Success through a Focus on the Whole Child- *What do your students need to be successful, what is the role of the foundation in meeting those needs and what is a "Whole Child" approach? Learn about the innovative approaches to addressing student need that the Issaquah School Foundation takes that are changing the lives of students in the Issaquah School District. We will highlight a number our programs (Cultural Bridges, VOICE Mentoring, Future Map, Artistic Support, Grants) as a part of this interactive session.*

- Carolyn Kramer | Issaquah Schools Foundation Director of Programs
- B. *Best Practices in Financial Management*** – *What does it mean to be a good steward of your organization and what are the critical steps your foundation needs to take to minimize your risk and liability.*
 - Kelly Rancourt, CPA | Clark Nuber Senior Manager, Audit and Assurance
- C. *Planned Giving***- *a step-by-step the process for establishing—or reinvigorating—an effective planed giving program including free and low-cost methods of marketing planned giving, endowment and investment policies needed, creating a legacy society, forming a professional advisory committee, educating your board and more.*
 - Patricia Snyder | Snyder Consulting
- D. *Engaging Your Community***- *How can foundations act as a catalyst to involve the entire community in public education? Learn about how the Bainbridge Schools Foundation created events to raise awareness that have nothing to do with an "ask."*
 - Mairead Shutt | Bainbridge Schools Foundation Executive Director

2:15 – 2:25

Break

2:25 – 3:00

One on One – Get your Questions Answered (small group break-out by topic area)

- Staff Campaigns
- Alumni Engagement
- Scholarships
- Strategic Planning
- Starting or Restarting Your Foundation
- More (Sign up at Registration)

3:00 – 3:50

Keynote- *The Importance of Storytelling and How to Do It Well*

- Shannon Doolittle | Fundraising and Donor Engagement Consultant

3:50 – 4:00

Closing and Door Prize Drawing

- Lynn Juniel | Bellevue Schools Foundation Executive Director

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