



Getting Started: School Foundation Kit

In the face of tightening budgets and more demands on resources, school foundations have seen resurgence across the state. School foundations are a way for school districts to enhance the educational experience of the students. The attached school foundation plan was developed to help school districts get started.

Included in this plan (in order of appearance):

- Case statement
 - Logic model
 - Budget worksheet
 - Event planning tips
- Annual fund plan
- Annual appeal letter
- Thank you letter

These items have been provided as samples, it is important for school district personnel to customize these pieces based on their personal needs and goals.

In the annual plan we have provided examples of three vehicles that can be used throughout the year to secure gifts for the foundation. Annual plans should include an annual appeal, an event, and either a capital campaign or major gifts. However, it is important to note that until a foundation has established itself, it will be difficult to raise funds for major gifts or capital campaigns.

Also note that special events are included in the annual plan, not as a large source of revenue, but rather to build support and engage the community in the foundation's mission. Special events should be thought of as a way to raise awareness.

As you embark on your school foundation journey we hope these materials will be of assistance to you. If you have any questions, we encourage you to contact us. Look for more school foundation resources in *Headlines* and at www.masb.org in the future.

Best wishes on your journey.

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Case Statement for ABC School Foundation

Problem Statement

Michigan school districts are currently facing financial woes due to decreases or freezes in state funding combined with rising costs, and the inability of school districts to seek financial assistance from their communities. These financial burdens are forcing districts to focus on funding issues rather than student achievement.

Mission

The ABC Education Foundation believes that all students deserve an equal opportunity to reach their potential in all educational and personal endeavors. Since all students don't have equal opportunities due to funding disparities, the ABC Education Foundation will strive to serve all students by providing additional financial support to enhance their educational experience.

Goals (2006-2008)

The goals of the ABC Education Foundation are to serve the ABC School District community with passion and commitment, with a shared vision towards excellence, achievement and enhancement of education programs. The ABC Education Foundation will generate and distribute financial assistance to: enhance student achievement and teacher effectiveness; provide academic and/or athletic scholarships; reward high achievement and promote the desire to learn; provide technology enhancements to encourage new approaches to learning; deliver enrichment opportunities; and, provide mini-grants to teachers to enhance and sustain classroom programs.

Objectives (2006-2008)

1. Establish and maintain a plan for fund generation to ensure the ABC Education Foundation long-term viability and to provide support for school improvement projects.
2. Establish scholarship criteria and distribution methods to increase the number of ABC School District students attending college within six months of establishing the foundation.
3. Provide financial assistance (to a minimum of 30 families within first two years) to alleviate the athletic participation fees for families of the ABC School District.
4. Distribute financial resources to improve accessibility to technology for all ABC School District students, with an end goal of providing a state-of-the-art computer for every three students within first two years.
5. Continue to strengthen the ABC School District's curriculum by offering teacher mini-grants, which have a proven track record of improving student achievement. Provide a minimum of 10 mini-grants (\$500-\$1,000) within first two years.

Programs

The ABC Education Foundation provides a wide array of programs to meet the diverse needs of the students and communities of the ABC School District.

Academic Scholarships

Higher education in Michigan has become unaffordable and inaccessible for many Michigan families. Having a college degree is becoming more significant and mandatory. Research shows people who possess a college degree earn at least an additional \$800 per month. Scholarships will make higher education more affordable and accessible to ABC School District families.

Athletic Scholarships

Due to decreased state funding and increased costs, the ABC School District was forced to institute athletic participation fees for each student interested in extra-curricular activities, including art and music. This severely limits the ability for many families to pay the fee, and for students to experience the benefits of teamwork, competition and camaraderie. The funding of athletic participation fees will allow more students to participate and reap the benefits of team sports and activities.

Mini-Grants

Teachers are continually choosing to pay for school supplies with their own money to supplement and enhance the learning environment within their classrooms. In fact, statistics show that on average, a teacher contributes more than \$1,000 annually. Mini-grants encourage the development of unique and creative educational experiences that allow teachers to enrich student achievement, while at the same time alleviating the financial burdens placed on teachers of the ABC School District.

Technology Enhancements

In order to prepare the students of the ABC School District to compete in a global, technology-dependent economy, the ABC School District must maintain state-of-the-art technology software and hardware. Financial assistance will allow the district to continually assess and upgrade technology as needed to improve the educational experience of ABC students.

School Improvement Projects

The ABC School District strives to provide the best educational experience possible, with a goal of being a national role model to other districts. The ABC School Foundation supports and encourages innovation in learning. By providing financial resources to programs that are cutting-edge, innovative and original, it fosters passion and excitement for learning.

Endowment

The ABC School District continually seeks endowment funds to strengthen the financial stability of the foundation as a whole, and create more unrestricted revenue streams. An endowment demonstrates the long-term mission of the foundation.

Finances

See attached event planning guide and budget worksheet.

Governance

The board of directors of the ABC Education Foundation implement policies and decisions that further the mission of the foundation. The focus is on providing financial resources that advocate for student achievement. A 9 to 15-member board of directors that is representative of the

community govern the ABC Education Foundation. There are three types of school foundation board of directors to choose from:

1. School board-controlled foundation—all foundation directors are appointed or controlled by the board of education.
2. Autonomous foundation board—the foundation board is entirely separated from the school board. The school does not need to give its approval to the changes the foundation board may want to operate.
3. The embedded model—the foundation is a separate, autonomous corporation. As members of the foundation board, school administrators represent the school's interest. Changes need to be approved unanimously by the school board representatives and the other members of the foundation board.

While deciding on which type of board will be most appropriate for the foundation, it is also critical to determine what the relationship between the foundation and the school or the school district will be. Board members should be financially committed to the foundation, thus setting a positive, credible example.

The basic format of a board includes a chairman, a president, a vice-president, a treasurer and a secretary. The board must be able to: determine the needs of the school; look at education programs, financial data and external environmental factors such as inflation and demographic changes; and, involve the parents and the community leaders.

Source: The National School Foundation Association.

Staff

The staff of the ABC Education Foundation will be comprised of volunteers, and if feasible, one full- or part-time director and/or full- or part-time assistants.

Facilities and Service Delivery

Foundation Office: 123 Foundation Lane, Foundation, MI 12345; 517.555.5555; 517.111.1111 fax; www.abcschoolfoundation.org.

Planning & Evaluation

See logic model attached.

History

In the fall of 2006, the school community comprised of parents, business leaders, alumni, faith-based representatives, senior citizen leaders, students and other concerned citizens within the ABC School District developed a school foundation in order to provide the school district with the financial means to deliver quality educational programs and activities to ensure all kids were well prepared to compete in a diverse, competitive world.

Sample Logic Model for the ABC School Foundation • 2006-2008

Total Program Inputs	Total Program Activities	Total Program Outputs
<ul style="list-style-type: none"> • Volunteers • Board of Directors • Staff • Operating Budget • School District Database of Parents, Business Leaders and Other Community Stakeholders • School District Staff For Expertise in School District Data, Resources, Needs, Education Issues, etc. • Donors 	<ul style="list-style-type: none"> • Board Meetings • Work Groups • Brainstorming Sessions • School District Needs Assessment • Fundraisers • Annual Campaigns • Special Events • Community Forums 	<ul style="list-style-type: none"> • Contributed \$XXX to ABC School District • Contributed \$XXX for Teacher Mini-Grants • Contributed \$XXX for Athletic Participation Fees • Contributed \$XXX for Special Projects • Contributed \$XXX for Technology Enhancements • Complete Budget Analysis and Projections • Annual Plan • Fundraising Letters • Thank You Letters • Case Statements • Annual Reports
Outcome	Performance Measure	Method of Measure
<ul style="list-style-type: none"> • Improved Student Achievement • Increased Athletic Participation • Increased Extra-Curricular Participation • Increased Teacher Awards • Increased Program Development • Increased Number of Students Attending College • Increased Parent and Student Satisfaction • Improved Accessibility to Technology 	<ul style="list-style-type: none"> • # and % of Students Whose Achievement Was Assessed • # and % of Students Who Participate in School-Sponsored Sports, Music, Plays and Art Programs • # and % of Donors • # and % of New Programs Created at ABC • # and % of Program Continuation • # and % of New Computer Hardware/Software 	<ul style="list-style-type: none"> • Test Scores & Student Grades • Number of Students Who Participate in School-Sponsored Sports, Music, Plays & Art Programs • Observation • Parent Surveys • Student Surveys • Curriculum Offerings • School Records
Results		Results Analysis and Next Steps
<ul style="list-style-type: none"> • Academic Scholarships: # of Academic Scholarships Awarded to Students of ABC; Improving Accessibility to Higher Education • Athletic Scholarships: # of Scholarships Awarded to Students of ABC; Alleviating Financial Burden of Families • Mini-Grants: # of Mini-Grants Awarded to Teachers of ABC; Allowing for Increased Student Achievement, Innovation and Alleviate Financial Burden of Teachers • Technology Enhancements: # of New Computers/Hardware/Software Installed at ABC; Improving Accessibility and Enhancing Learning Environment • School Improvement Projects: # of Projects Financed at ABC; Enhancing Innovation and Excitement for Learning • Endowment: # of Philanthropist Financing the ABC Foundation; Creating Unrestricted Funds 		<ul style="list-style-type: none"> • Are the Results as Expected? Better or Worse? Why? • What Reasons/Circumstances Contribute to the Results? • Based on the Results, What Changes in Program and/or Outcome Measurement will be Implemented? • What are Your Next Steps? • What Improvements/Changes Should be Made? • Were the Resources Used Effective? • What Resources Were Under Utilized?

Sample Event Budget Worksheet

Category	Estimated Cost	Donated	Vendor	Date Needed By	Contact Info	Notes
Invitations						
Response Card						
Flyers						
Food/Drink						
Location						
Decorations						
Entertainment						
Gifts/Giveaways						
Speaker Fees						
Silent Auction						
Media/Press Releases						
Sponsorships						
Set Up Supplies						
Other						
Total Event Budget=\$10,000						
Anticipated Revenue=\$50,000						

Rule of Thumb: Expenses Should Not Exceed 20 Percent of Anticipated Revenue

Fundraising Event Planning Guide for the ABC School Foundation

Fundraising is an integral part of providing supplemental support for school districts. A fundraiser or event is a good way to build community support and synergy around your school district—and student achievement. Planning a fundraiser can be easy with good organization. With the right approach you are sure to reach your fundraising goal and have a great time doing it! Below are some planning tips that will help you keep your goal, budget and time in mind.

Tip #1: Set Goals

It is important to begin your fundraising plan by establishing your goals for the fundraiser. Make decisions about who your audience will be, what kind of fundraiser you want to have and what you wish to accomplish (how much money you wish to raise or awareness about the foundation/school district). Communicate and discuss your goals with all those who will be involved and keep written records of any changes or updates to your goals.

Tip #2: Develop a Budget

The budget is a financial outline for you to use while planning your event. It should contain all anticipated expenses and incidentals. The budget should be as specific as possible even if you are having a small fundraiser. A budget for a large fundraiser would include income, such as sponsorship, ticket sales, concession stands and donations, as well as expenses such as entertainment, advertising, invitations, media activities, venue expenses, gifts and supplies to set up the event. Work with your volunteers, staff, community and board to determine which items you will need to buy and which items can be donated. See sample budget chart attached.

Tip #3: Set the Date and Time

Now it's time to set a date. Remember to work far enough in advance so attendees have ample time to save the date. When choosing a date, make sure it does not conflict with national holidays, school activities, community events and testing dates.

Tip #4: Create a Timeline and Make a Checklist

After you have set the date of your event, create a schedule of how you want to organize your event and the steps you will need to take to get everything completed. A checklist of necessary actions or decisions and when they should be completed is key to keeping yourself organized and on track. Try working back from the date of the fundraiser to get a better idea of timing: for example, invitations or flyers to promote the event can be distributed 3 to 6 weeks before the event (depending on formality).

Tip #5: Choose a Location

Pick a location where you want the event to be held (if there is a cost to renting a location, remember to include it in your budget). Your own school and community buildings are the best options. Remember, holding events at your school is a great way to bond the community and school district together and showcase what your school has to offer. Depending on the type of event you are throwing, consider asking a board member, legislator or local celebrity to host the event as a way to save money.

Tip #6: Choose Your Entertainment

Consider showcasing your school district band, choir, dance or thespian groups as a way to save money and show the community the benefits of funding your school. As in any school related activity, the focus should always be on the kids!

Tip #7: Publicize the Event

There are many ways to publicize your event that are cost effective. Think outside the box and use the community resources available to you. Here are a few ideas to get you started:

- School newsletters
- School calendar
- Bulletins
- District Web site
- E-mail alerts
- School marquees
- Community newspapers
- Press releases
- Flyers in local libraries, coffee shops, grocery stores, community centers, post offices, faith-based organizations, doctor's office, salons, etc. You get the point—you can put them anywhere and everywhere!
- Face-to-face—word of mouth is the best form of publicity. Tell everyone you know.
- Cable access stations
- Involve the PTA, real estate agents and school alumni
- Invitations

Tip #8: Get Food, Drinks and Decorations

Depending on the type of event, refreshments and decorations may be very important or not important at all. If your event is casual, you can save money by asking vendors or friends to donate food and drinks. For a more formal event, you might want to price catering options, or see if you can get a local caterer to donate their services. If you're having a themed event, decorations can set the mood—get creative! This is a great way for schools to utilize existing cafeterias, concession stands and school-sponsored culinary programs.

Tip #9: Enjoy!

Recruit enough volunteers and delegate duties on the day of the event to lessen stress and enjoy the big day or night. The whole event will run more smoothly if you coordinate things instead of trying to do everything yourself. This is a great opportunity to involve parents, alumni, senior citizens and business leaders.

Tip #10: Send Thank You Notes

Thank you notes are a must. Thank you notes reassure your donors. Consider following up with donors to let them know the programs and services you were able to provide because of their donations. If their donations sponsored a scholarship, consider asking the student to write them a hand-written note of appreciation. It's no secret that thank yous increase response to subsequent appeals, increase donor loyalty, and build long-term relationships.

Sources: The National School Foundation and breastcancer.org.

Annual Fund Development Plan for ABC School Foundation

Please note that this plan offers a list of possibilities and options. Each individual school foundation needs to tailor the problem statement, goals, objectives, programs, services, etc. to fit its unique needs and situations.

Problem Statement

Michigan school districts are currently facing financial woes due to decreases or freezes in state funding combined with rising costs, and the inability of school districts to seek financial assistance from their communities. These financial burdens are forcing districts to focus on funding issues rather than student achievement. Michigan has approximately 600 school districts, all of which have unique funding formulas and needs. School boards are elected to oversee the district's budget, however, boards of education do not provide the funding; that is the job of the legislature. Many school districts are facing declining enrollments due to alternative options and economic woes that cause people to move to another city, state, etc. These issues also have implications on class size, teacher shortages and equity.

Mission

The ABC School Foundation believes that all students deserve an equal opportunity to reach their potential in all educational and personal endeavors. Since all students don't have equal opportunities due to funding disparities, the ABC School Foundation will strive to serve all students by providing additional financial support to enhance their educational experience.

Vision Statement

The ABC School Foundation envisions enriching the educational environment for all students of the ABC community. The foundation strives to augment, supplement or complement programs and activities currently being provided by the district. The ABC Foundation envisions a future where all students excel and are afforded equal opportunities to do so.

The ABC Foundation envisions a community that embraces the goals and mission of the foundation and continuously works to improve the education of all students, which ultimately leads to improved student achievement, a richer community and strong leadership.

Goals and Objectives (2006-2008)

The goals of the ABC School Foundation are to serve the ABC School District community with passion and commitment, with a shared vision towards excellence, achievement and enhancement of education programs. The ABC School Foundation will generate and distribute financial assistance to: enhance student achievement and teacher effectiveness; provide academic and/or athletic scholarships; reward high achievement and promote the desire to learn; provide technology enhancements to encourage new approaches to learning; deliver enrichment opportunities; and, provide mini-grants to teachers to enhance and sustain classroom programs.

1. Establish and maintain a plan for fund generation to ensure the ABC School Foundation long-term viability and to provide support for school improvement projects. Establish a donor base of ## individuals, reach goal of \$\$ and/or increase donations by ##% by 2008.

2. Establish scholarship criteria and distribution methods to increase the number of ABC School District students attending college within six months of establishing the foundation.
3. Provide financial assistance (to a minimum of 30 families within first two years) to alleviate the athletic participation fees for families of the ABC School District.
4. Distribute financial resources to improve accessibility to technology for all ABC School District students, with an end goal of providing a state-of-the-art computer for every three students within the first two years.
5. Continue to strengthen the ABC School District's curriculum by offering teacher mini-grants, which have a proven track record of improving student achievement. Provide a minimum of 10 mini-grants (\$500-\$1,000) within first two years.

Programs and Services

The ABC School Foundation provides a wide array of programs to meet the diverse needs of the students and communities of the ABC School District.

- Academic Scholarships
- Athletic Scholarships
- Mini-Grants
- Technology Enhancements
- School Improvement Projects
- Endowment

Governance

The board of directors of the ABC School Foundation implement policies and decisions that further the mission of the foundation. The focus is on providing financial resources that advocate for student achievement. A 9 to 15-member board of directors that is representative of the community govern the ABC School Foundation. There are three types of school foundation board of directors to choose from:

1. School board-controlled foundation—all foundation directors are appointed or controlled by the board of education.
2. Autonomous foundation board—the foundation board is entirely separated from the school board. The school does not need to give its approval to the changes the foundation board may want to operate.
3. The embedded model—the foundation is a separate, autonomous corporation. As members of the foundation board, school administrators represent the school's interest. Changes need to be approved unanimously by the school board representatives and the other members of the foundation board.

While deciding on which type of board will be most appropriate for the foundation, it is also critical to determine what the relationship between the foundation and the school or the school district will be. Board members should be financially committed to the foundation, thus setting a positive, credible example.

The basic format of a board includes a chairman, a president, a vice-president, a treasurer and a secretary. The board must be able to: determine the needs of the school; look at education programs, financial data and external environmental factors such as inflation and demographic changes; and, involve the parents and the community leaders.

Source: The National School Foundation Association.

Narrative of 2006-07 Fund Raising Plan

The ABC School Foundation annual budget is approved by the ABC School Foundation Board of Directors and guided by the ABC Foundation executive director/superintendent or equivalent leader. The annual plan involves a direct mail campaign to the identified markets, special event(s) for fundraising and awareness, and major gifts. The annual fund is a letter campaign that staff and volunteers work together to implement. Members of the board of directors will solicit all major gifts/donors identified through various sources and cultivation.

Overall Markets:

- Foundation board members
- School board members and administration
- School staff
- Parents, grandparents and other family members
- Volunteers
- Business community members
- School vendors
- Faith-based leaders
- Senior citizen leaders
- Service clubs, organizations and other groups (Jaycees, Rotary, Junior League, etc.)
- School alumni

Fund Raising Overall Income Projections

This fund development plan will include our annual fund, special event and major gifts solicitations. The annual fund and special event will raise unrestricted funds, while the major gifts will raise both restricted and unrestricted funds, depending on the wishes of the donor. Some donors may choose to fund specific programs, including teacher mini-grants, scholarships, technology enhancements or overall school improvement projects. In order to fund our programs it is necessary to raise approximately \$30,000. (Customize this figure to your own needs; this will change after your foundation has been established and baselines set.)

Total Fund Raising Goals

	Total Goal	Estimated Cost	Revenue
Annual Fund	\$15,000	\$1,500	\$13,500
Special Event	\$3,000-\$5,000	</\$1,000	\$2,000-\$4,000
Major Gifts	\$10,000	\$1,000	\$9,000
Totals	\$27,000-\$30,000	\$3,500	\$23,500-\$26,500

Specific Vehicles:

1. Annual Fund

The following is only an example of an annual fund. Each school district should cater their goals to their own resources. According to the National School Foundation Association, the average amount raised by most school foundations is about .3% of a district's budget. For example, if your overall budget is \$10 million then your annual goal should be approximately \$30,000 (\$10 million X .003=\$30,000). Furthermore, research by the School of Education at the University of Puget Sound in Tacoma, Washington, found that those foundations that raise less than \$10,000 annually usually provide mini-grants and scholarships. Foundations that raise \$20,000 to \$50,000 a year tend to fund curriculum enrichment programs, teacher training and teacher resources. And those that raise more than \$100,000 annually often underwrite teaching positions.

Goal	\$15,000
Market	Identify the number of potential donors based on overall markets.
Gift Range	\$10-\$750
# of Gifts	Potential Donors: A rule of thumb is that 10% of your donors have the capacity to give 60% of the total funds raised. Based on this formula and your particular markets, it is a good idea to identify the total number of donors needed to reach your goal. For example, the goal is \$15,000, so 10% of your donors will raise \$9,000 towards your goal.
Average Gift	\$75
Ask When No History	\$100
Resources	Staff time, postage, paper, envelopes
Strategies	Personal letters, Student letters, Word-of Mouth, Newsletters, Web site for Online Donations
Responsibility	Foundation staff, board and volunteers

Timeline

1.1	Prepare gift range chart (as a visual representation) based on donor history-staff	June/July
1.2	Assign staff/board/volunteer to different donor segments	August
1.3	Create case statement; customize to each donor segment	August
1.4	Create and print annual fund package/letters/response card; customize to each donor segment	September
1.5	Implementation and mailing of annual fund	October
1.6	Track donor response/attitudes and donations	Oct-Dec
1.7	Thank and recognize donors; thank donors as donations are received; all thank you letters should be completed by January	Ongoing

2. Special Event

The possibilities for special events are endless and it's important to cater your event to your community and the resources available to you. Special events are geared more towards

generating awareness for your cause and/or foundation, as opposed to raising substantial amounts of money. Some examples of special events include golf outings, cook-offs, talent shows, bingo, raffles, casino nights, spelling bees, read-a-thons, luncheons/dinners with motivational speakers, etc. (Be sure to check Michigan laws regarding specific special events, i.e. gambling). This plan will provide an outline for one event—the cook-off. The school-lunch cook-off will bring community members together to show off their best school lunch recipe. Participants will pay an entry-fee and tickets will be sold to attend the event and sample the food. The event will also feature a 50/50 raffle and accept donations. Cook-off winners will receive donated cash and prizes and their recipes featured on the school lunch menu. Depending on how many prizes/services, etc. are donated by businesses, a silent auction may be worthwhile.

Goal	\$3,000-5,000
Market	School staff, parents, senior citizens, businesspeople, students, alumni and faith-based leaders
Sponsors	Solicit community businesses to donate prizes, cash and services for the raffles and the cook-off grand prize
Resources	Budget, date/time, entertainment (use school groups), publicity/promotions, volunteers, decorations, thank you letters, foundation staff and emcee for event (see attached budget worksheet)
Strategies	Find participants, sell raffle and event tickets, solicitation of sponsors, business/vendor support
Responsibility	Foundation staff, event committee and volunteers

Timeline (see attached fundraising tips sheet)

2.1	Develop event purpose, description, criteria, rules and budget	Nov/Dec
2.2	Select date	December
2.3	Recruit volunteers for event committee	December
2.4	Recruit students to develop/design promotion/marketing materials	Dec/Jan
2.5	Develop invitation list	January
2.6	Solicit sponsors	Jan-March
2.7	Evaluate budget projections	Jan-Feb
2.8	Secure emcee	January
2.9	Event committee finalizes promotional materials	February
2.10	Promote event in district newsletters, Web, e-mail, newspapers, etc.	Ongoing
2.11	Mail invitations or marketing materials	February
2.12	Select student entertainment	March
2.13	Event happens	April
2.14	Thank and recognize donors	April

3. Major Gifts

Major gifts are an important part of your fundraising campaign. Before soliciting major gifts it's important to conduct detailed research on prospective donors, otherwise known as cultivation.

The majority of your major gifts will come from individuals, with few from business/corporations. Each prospective donor is identified and qualified by three criteria: (1) linkage to the organization; (2) ability to give gifts at the level being sought; and (3) interest in the work of the foundation. In order to fully cultivate a donor, and build a meaningful, long-lasting relationship, it is important to know the interests, concerns, hobbies, education, family history, experience in the nonprofit/education world, civic, social and fraternal positions, and religious affiliations. Major gifts, depending on the amount and donor, may be restricted or unrestricted funds.

Goal	\$10,000
Market	Individuals—alumni, senior citizens, businesspeople
Gift Range	\$500-\$2,500
# of Gifts	You need to identify the number of gifts needed to reach your goal in relation to your donor base. Your major gift donor base is usually much smaller than your overall donor base. A rule of thumb to follow is that 3 to 5 percent of the overall donor base have the ability to make major gifts.
Average Gift	\$1,500
Resources	Board of directors, staff and fund raising committee, volunteers, expense account for cultivation activities, postage/printing, funds for donor database and tracking information.
Vehicles	Planned giving, trust funds, stocks, bequests, property, life insurance (adhere to foundation policy).
Strategies	Face-to-face solicitations and personal correspondence are the most effective methods of securing major gifts.
Responsibility	Board of Directors, foundation staff and volunteers

Timeline

3.1	Establish major gift committee	Nov/Dec
3.2	Foundation staff/volunteers draft major gift case statement	January
3.3	Committee meets to discuss case statement* and establish regular meeting dates	February
3.4	Finalize case statement and produce/package appropriately	March
3.5	Identify and research prospective donors	April-July
3.6	Assign prospective donors to solicitation team	July/August
3.7	Plan and carryout cultivation activities (i.e. face-to-face meetings to build relationship and discuss foundation goals)	Aug/Sept
3.8	Solicit prospective donors	Oct-Dec
3.9	Thank and recognize donors-should be completed by January	Ongoing
3.10	Evaluate campaign progress, goals and effectiveness	January

*Major gift case statements should be developed based on your foundation case statement, but customized to the specific needs/goals of your major gifts.

Date

Ms. Jane Doe
123 Any Street
Any Town, MI 01545

Dear Ms. Doe,

Would you like to honor an ABC student and help enhance the educational opportunities of all ABC students?

Now you can. The ABC School District has created a foundation to serve all students by providing additional financial support to enhance their educational experience. There are many children right in your community who do not have the means to go to college, participate in extra-curricular activities, learn technology skills or experience innovative approaches to learning. The ABC School Foundation believes in all kids and wants to provide each of them an equal opportunity to reach their potential in all educational and personal endeavors. Won't you join me in making a difference in the life of a child?

If you are considering a year-end tax-deductible donation, and you are concerned about what the future holds for our children, I'd like to tell you what your gift could do: *(Local districts customize to your foundation programs.)*

- Higher education in Michigan has become unaffordable and inaccessible for many Michigan families. Having a college degree is becoming more significant and mandatory. Research shows people who possess a college degree earn at least an additional \$800 per month. Academic scholarships will make higher education more affordable and accessible to ABC School District families.
- Due to decreased state funding and increased costs, the ABC School District was forced to institute participation fees for each student interested in athletics and extra-curricular activities, including art and music. This severely limits the ability for many families to pay the fee, and for students to experience the benefits of teamwork, competition and camaraderie. The funding of athletic participation fees will allow more students to participate and reap the benefits of team sports and activities.
- Teachers are continually choosing to pay for school supplies with their own money to supplement and enhance the learning environment within their classrooms. In fact, statistics show that on average, a teacher

contributes more than \$1,000 annually. Mini-grants encourage the development of unique and creative educational experiences that allow teachers to enrich student achievement, while at the same time alleviating the financial burdens placed on teachers of the ABC School District.

- In order to prepare the students of the ABC School District to compete in a global, technology-dependent economy, the ABC School District must maintain state-of-the-art technology software and hardware. Financial assistance will allow the district to continually assess and upgrade technology as needed to improve the educational experience of ABC students.
- The ABC School District strives to provide the best educational experience possible, with a goal of being a national role model to other districts. The ABC School Foundation supports and encourages innovation in learning. By providing financial resources to programs that are cutting-edge, innovative and original, it fosters passion and excitement for learning.
- The ABC School District continually seeks endowment funds to strengthen the financial stability of the foundation as a whole, and create more unrestricted revenue streams. An endowment demonstrates the long-term mission of the foundation.

Your financial commitment of \$100 (*local districts should customize the ask amount based on your prospective donors*) will help ensure that financial challenges do not keep students in your community from participating in school activities or pursuing their dream of obtaining higher education.

You can be part of this satisfying and important work. Best of all, you know that your hard-earned and generous contribution is taken seriously and goes directly to the kids of the ABC community.

Consider donating in honor of an ABC student or alumni.

To acknowledge your contribution, you will receive a personal note from the student that was the recipient of your generosity updating you on their projects, accomplishments and future endeavors.

Your financial commitment will help to ensure that the students of ABC School District graduate to become responsible citizens, life-long learners and thoughtful problem solvers able to compete in a competitive world.

As an important member of the ABC School community, I invite you to visit the ABC School District and see first-hand your contribution at work. Join the kids and attend an upcoming music ensemble, art exhibit, or technology fair and see for yourself the talent and potential of our future leaders.

You'll be a partner in their success!

Sincerely,

ABC School Foundation

Board President

(Customize signer based on your donor audience, i.e. business leader, senior leader, parent leader, faith-based leader.)

P.S. I am requesting your consideration of a leadership gift of \$100 to give all students an equal opportunity to reach their potential! Time is of the essence. Make your contribution today to ensure that every student has the opportunity to benefit this year!

Date

Ms. Jane Doe
123 Any Street
Any Town, MI 01545

Dear Jane,

Please let me take a moment and personally thank you on behalf of the entire ABC School Foundation and the ABC School District. Your recent contribution of \$100 demonstrated your passion and commitment to providing quality education to all students of the ABC community.

Your financial support allowed us to provide Johnny Doe the opportunity to participate in the high school jazz band, and make progress towards awarding the first mini-grant for innovative and cutting-edge programming. *(Local districts should customize your stories.)*

Since your passion and commitment is so evident, I would like to extend an invitation to visit the school, be a part of the fundraising committee or serve as a volunteer for the foundation.

The commitment and loyalty of community members such as yourself is truly inspiring and I would like to thank you once again. Without your help it would be difficult for us to provide the exceptional programming and activities our kids deserve.

Sincerely,

ABC School Foundation
Board President
(Customize signer based on your donor audience, i.e. business leader, senior leader, parent leader, faith-based leader.)

P.S. You will be receiving a personal note from Johnny soon, as he is excited to share his experience in the jazz band with you.