

THE LEF LEADER

WINTER 2012

A Publication for Local Education Foundation Supporters

Why, When and How to Hire an Executive Director for Your School Foundation

Of the 220 public school foundations in Oklahoma, nearly 20 now have paid staff members who serve either as an administrative assistant or an executive director. The staff members range from part-time contractors to full-time professional staff with extensive experience in fundraising and nonprofit administration. In very large school districts, some foundations have multiple staff members.

With this growing trend in Oklahoma and nationwide, we asked foundation leaders and nonprofit consultants to share their experiences that might be helpful as other foundation boards consider the pros and cons of hiring an executive director or administrative assistant.

"We often work with groups who are struggling with the question of whether or not to hire an executive director," said Milli Christner, a partner with Foundation Innovation, a

national school foundation consulting firm. "There are several key questions a board needs to consider before placing an ad in the paper or online: 'Do we have a plan for expanding the organization? Are we ready to be employers and deal with things like payroll taxes, employee policies and annual reviews? Do we have a long-range budget to cover administrative costs? Are we committed as a board to taking our foundation to the next level?'"

Jenifer Bartley, a part-time executive director for the Stillwater Public Education Foundation, said her foundation chose to hire an executive director to help keep up with the day-to-day duties of running a foundation, from depositing donations and writing thank-you letters to monitoring grants and publicizing the foundation. "The foundation grew large enough that it needed an employee who could dedicate more time to keeping up with daily operations,

as well as be the central point of contact when officers and committee chairs were changing from year to year," Bartley said.

Sylvia Fooshee, executive director of the Sand Springs Education Foundation, said that in addition to meeting the daily needs of the foundation, it's good to have one person who has "the foundation's memory" at her fingertips. "Before, the various officers just had folders or boxes that were passed around," she said. "Now we have everything in one place – all files, records, correspondence."

Fooshee, a former teacher whose children attended Sand Springs Schools, works at least 12 hours a week on a flexible basis. Her duties include organizing meetings and events, conducting campaign mailings, doing public relations and website updates, and managing social media. An accountant handles the foundation's

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Oklahoma Foundation Leaders Encouraged to Attend National School Foundation Association Conference

Oklahoma's local education foundations are encouraged to attend the Eighth Annual National School Foundation Association Annual Conference, slated April 11-13 at the Frisco Conference Center and Embassy Suites in Frisco, Texas.

"With this year's annual conference being in close driving distance, this is a unique opportunity for Oklahoma's local education foundation leaders to join with peers from around the country for an outstanding training and networking conference," said Karen Rose, director of Local Education Foundation Outreach.

If you are interested in traveling together as a group with other Oklahoma school

foundation leaders, please contact Rose at (918) 743-5533 or email krose@ofe.org. Workshops and plenary speakers will focus on all elements of effective K-12 education foundation and non-profit operations as well as volunteer program management. In addition to hearing four keynote speakers, participants can choose from more than 60 workshops.

Marla Lillie, director of the Claremore Public Schools Foundation, said her experience at the last national conference was truly transformative. "The conference expanded my thinking about what we were doing



and how we were doing it, which started a dialogue with my board and then resulted in a dialogue with our district administrators, which then resulted in identification of a district need," she said. (See the LEF Roundup for details about Claremore's technology initiative.) "I am so excited that this initiative will affect every student in our district, from the struggling learner to the gifted student - all because of the NSFA conference!"

For registration information, visit the National School Foundation Association website at www.schoolfoundations.org or call (515) 971-2324.

Thank you to these LEF Outreach Committee volunteers who helped plan and host this year's Fall Forum for Local Education Foundations!

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Fall Forum Brings Together School Foundations, Mentoring Groups

Nearly 250 participants attended this year's Fall Forum for Local Education Foundations and Youth Mentoring Programs, presented in October by the Oklahoma Foundation for Excellence.

As part of its David and Molly Boren Mentoring Initiative, the Foundation for Excellence added a mentoring track to this year's Fall Forum to encourage school foundations and mentoring organizations to work together to promote mentoring as a positive step toward academic success.

"I came up with the idea of starting a mentoring program for boys age 12 to 18," said one participant. "I'm leaving with some great tools to get started."

Many of the participants commented on the expertise and professionalism of this year's presenters. "I wish our foundation had been coming for years," said a foundation representative.

Keynote speaker Janet Barresi, state superintendent of public instruction, commended Oklahoma's public school foundations for helping provide an "all-hands-on-deck approach" to Oklahoma's education challenges. She called on foundations and education leaders to help support a 3C strategy to make every student in Oklahoma "college, career and citizen



State Superintendent of Public Instruction Janet Barresi delivers the keynote address at the Fall Forum luncheon.

ready." Citing reforms in the areas of literacy and STEM (Science, Technology, Engineering and Mathematics), Barresi said, "Students graduating with a high school diploma in Oklahoma should either be ready to enter the workforce successfully or enter college without requiring remediation, and they should know something about our country, our history and about our system of government."



School foundation leaders from throughout Oklahoma share successes during an LEF networking session.



Mentoring advocate Tom Pace, author of *Mentor: The Kid and the CEO*, was among the speakers for the forum's new mentoring track.



Nancy Dye, director of the American Schools Foundation Alliance, shares successful fundraising initiatives from foundations across the country.

Presenter handouts from 2011 Fall Forum speakers are available on the Fall Forum section of the Oklahoma Foundation for Excellence website at www.ofe.org.

Contact Us!
Oklahoma Foundation for Excellence

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www.ofe.org

Executive Director (continued)

bookkeeping. Fooshee said her job description was adapted from Elaine Free's book, *A Guide to Education Foundation Policies and Procedures*, combining both the duties of executive director and administrative assistant.

Marla Lillie, who works part time as executive director for the Claremore Public Schools Foundation, said she is the "front person" representing the foundation in the schools and in the community and the facilitator who keeps projects moving, committees involved and communication flowing. She said it helps for the board to have very clear expectations of what the director's responsibilities are, and what the board responsibilities are. "Our board is a working board, and fundraising is everyone's job. Being present and working events is everyone's job. I think it would be a recipe for disaster if a foundation hired an executive director and expected that person to do everything."

Christner said Foundation Innovation is seeing a new trend of an increasing number of foundations looking for executive directors who have a background in fundraising and development. "Many are hiring outside of the public schools sector and are looking for candidates from the nonprofit or higher education arenas," she said. Some of these professionals may have CFRE (Certified Fundraising Executive) credentials from the Association of Fundraising Professionals.

One misconception that some foundations have is that when they hire a professional, they can pay them a percentage of what they raise, Christner said. "This is actually outside the ethical standards as outlined by the Association of Fundraising Professionals."

The Oklahoma Foundation for Excellence surveyed Oklahoma's public school foundation directors and found annual salaries for full-time employment ranging from \$31,200 at small districts to over \$80,000 in large districts. In most cases, salaries were paid out of the foundation's general funds. In one case, a foundation had a donor that sponsored the staff salary for the first 10 years. Another foundation went through a three-year transition period in which the salary was funded through a grant and from savings.

"We often hear, 'We'll just hire an executive director, and they'll raise enough money to cover their

salary,'" Christner said. "The reality is the board needs the commitment and proper infrastructure in place to significantly increase their size and revenue to cover the cost of the executive director's salary."

The accepted best practice for nonprofit organizations is for administrative costs to be below 20 percent, and preferably below 15 percent, of their annual expenses, Christner added. That means that the organization needs to raise more than five times the administrative costs.

"There does appear to be a correlation between hiring an executive director and the amount of money a foundation raises," she added.

The Midwest City-Del City Public Schools Foundation hired its first executive director two years ago to focus on public relations and development, and to partner with the district in ways that will reach more students and more district buy-in. "The board is working at a much higher level and is more effective," said Sundra Flansburg, executive director.

Research and planning are critical to success when hiring a staff person, said Karen Rose, director of LEF



Oklahoma has a growing number of executive directors serving its public school foundations. Among them are (from left) Lou Christian of Chickasha, Jenny Dakil of Norman, Sundra Flansburg of Midwest City-Del City, Sylvia Fooshee of Sand Springs, Caroline Gist of Putnam City and Marla Lillie of Claremore, shown here attending the 2010 Fall Forum. The Oklahoma Foundation for Excellence coordinates semiannual meetings for executive directors to network and share advice and encouragement.

Outreach for the Oklahoma Foundation for Excellence. Board members should talk to other school foundations that have hired staff. They should consult with experts, such as the Oklahoma Foundation for Excellence or Foundation Innovation, and they should do some long-range planning to determine if they are ready to take their foundation to the next level.

"I have seen foundations grow tremendously when they decided to hire a staff person," Rose said. "But they've got to lay the groundwork, create a plan

and be in a strong financial position to support it."

During her foundation's transition time, Flansburg said she became very aware of the positive benefits of her board's careful planning process. "Flexibility and focus on the overall mission and goals are important to come back to over and over again," she said. "I think that every board member and a number of stakeholders have felt that hiring a director was a good decision for our foundation."

For more information on hiring an executive director, including sample job descriptions and helpful links, visit www.ofe.org and click on Local Education Foundation Outreach.

Start a School Foundation In Your District

The Oklahoma Foundation for Excellence offers a variety of complimentary services for developing and established public school foundations, including board retreats, training events, regional meetings, online resources and starter websites for your foundation. To learn more, visit our website at www.ofe.org.

Update Your Foundation Records with OFE

Have you had a change in address or changed the president or primary contact person for your foundation? Please help us communicate with you by providing updated contact information, including email address, to Karen Rose, director of Local Education Outreach, at krrose@ofe.org.

You spoke, and we listened! After years of providing the *LEF Leader* as an electronic newsletter, we are providing the publication in both print and online for your convenience. We would love to hear from you. Send us your ideas for future issues to krose@ofe.org.

LEF News Roundup

The Oklahoma Foundation for Excellence seeks news and achievements from local education foundations around the state to share in our LEF News Roundup in this newsletter and on our website. If you have information or photos to share, please email krose@ofe.org.

The **Claremore Public Schools Foundation** will soon celebrate the completion of its 2011 Technology Initiative. After meeting with administrators to identify the district's greatest needs, the foundation launched an \$80,000 fundraising campaign, with an additional \$80,000 matching grant from an anonymous donor, to purchase and install 100 LCD projectors. The campaign will provide projectors in each district classroom that doesn't already have one. "Not only does it meet many teachers' needs, but it also provides the 'springboard' piece of equipment for technology enhancements such as SmartBoards without depleting grant funds," said foundation director Marla Lillie. Buying the LCD projectors in bulk and installing them together is also resulting in cost savings and reduced classroom disruption. For more information on the project, contact Marla Lillie at (918) 341-7535.

The **Clinton Public School Foundation** has launched a fundraising drive for its 25th Anniversary. Titled the Maroon & Gold & Silver Drive (for the

school's colors and the 25th anniversary), the goal is to raise \$100,000 this fiscal year. The foundation's board voted to place half the proceeds in the endowment and to make the other half immediately available for school projects. One such project already selected is the reinstatement of the elementary art program, a very popular program that was cut a few years ago due to budget constraints. The foundation also recently hosted a scholarship seminar for high school seniors and their parents, providing information and pointers regarding the application process for the \$30,000 in college scholarships that the foundation awards each May.

The **Inola Education Foundation**, which was established less than two years ago, recently hosted Marla Lillie and Frank Robson of the Claremore Public Schools Foundation, who shared ideas and experiences that could benefit the new foundation. Robson was instrumental in starting the Inola Foundation. In its

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Nominations Sought For Outstanding Public School Foundation Programs

The Oklahoma Foundation for Excellence is seeking nominations for its 2012 Outstanding Program Awards for Local Education Foundations. The foundation annually recognizes innovative programs sponsored or administered by public school foundations. Plaques and monetary awards of \$1,000 each will be presented to honorees at the Oct. 23 at the Fall Forum for Local Education Foundations.

Recognized programs may include but are not limited to: mentoring, arts integration, student leadership development, curriculum enhancement,

student scholarships, professional development for teachers, public relations and fundraising. Nominations for recognition may come from anyone in the community knowledgeable about the foundation, including its board members. Only one program per foundation may be nominated for recognition.

Nomination forms, as well as descriptions of past recipients, are available online at www.ofe.org. Nominations must be postmarked on or before March 15 and mailed to the Oklahoma Foundation for Excellence, 120 N. Robinson, Suite 1420-W, Oklahoma City, OK 73102. For more information, contact Karen Rose, director of Local Education Foundation Outreach, at (918) 743-5533 or e-mail krose@ofe.org.



The Oklahoma Foundation for Excellence presented its 2011 Outstanding Program Award for Local Education Foundations to the Putnam City Schools Foundation to honor its sponsorship of Parent Tool Kits for the Early Birds Childhood School Readiness and Parent Education Program. OFE representatives (from left) Suzanne Thompson, chair of the Local Education Outreach Committee, and President Susie Thurmond presented the award to Putnam City Schools Foundation Director Caroline Gist (center); Early Birds Program director Kelly Suchy, and Putnam City Schools Foundation board member Mark McCoy.

Director's Thoughts:



Steps for Building a Stronger Foundation

The Fall Forum was quite a success! How fortunate we are to have such a wonderful, dedicated committee to ensure its success! And, thanks to the generosity of Frank and Ludmila Robson, we were able to provide complimentary registrations for new and developing local education foundations (LEFs) as well as teachers to attend.

One of the benefits of our Fall Forum is the positive interaction that occurs among the attendees. We can learn not only from the presenters, but also from each other — how powerful! The special networking session provided some quality time for this to occur.

Speaking about learning from each other, I encourage you to take time to join our Facebook page, Oklahoma Local Education Foundations. Through this Facebook page, LEFs can benefit by having an easy way to ask questions and get responses, share fundraising ideas, and basically continue networking throughout the year. I hope you will consider signing on and participating.

Another benefit of this year's Fall Forum was the inclusion of mentoring sessions. LEF leaders had the opportunity to learn more about mentoring programs and talk with practitioners who have operated successful mentoring programs in their communities. I encourage LEF leaders to work with their local schools and chambers of commerce to initiate a mentoring program in their community if one does not exist. Research has overwhelmingly shown the positive impact an adult role model or mentor can have on a child or young adult. Take time to make a difference!

As the end of 2011 approaches, I am reminded of Randall Hallett's presentation last year on legal issues pertinent to education foundations. He emphasized the importance of nonprofits filing their Form 990 on time each year. This form is due the 15th day of the fifth month after the end of your foundation's fiscal year. Foundations that neglect this important responsibility for three years lose their tax-exempt status. Randall stated that, unfortunately, education foundations make up a significant number of those losing their tax exempt status! For more information about the 990 filing, go to www.irs.gov/charities/index.html.

Thank you again to all who helped ensure a successful Fall Forum! Oklahoma is so fortunate to have so many people dedicated to excellence in education!

Dr. Karen Rose
Director of LEF Outreach

Thank you to these foundations who have donated to our 2012 Local Education Foundation Outreach Campaign.

- Claremore Public Schools Foundation
- Cushing Public School Foundation
- Frederick School Enrichment Foundation
- Holdenville Education Foundation
- Mid-Del Public Schools Foundation
- Moore Public Schools Foundation
- Okemah Public School Foundation
- Pioneer-Pleasant Vale Academic Foundation
- Sand Springs Education Foundation, Inc.
- Stillwater Public Education Foundation
- Walters Public Educational Foundation

Support LEF Outreach Programs in Oklahoma

Through its Local Education Foundation Outreach Program, the Oklahoma Foundation for Excellence has helped build one of the nation's strongest and most successful networks of public school foundations, providing free training and resources for new and established foundations. You can help support our Local Education Foundation Outreach Program through a gift to our 2012 LEF Outreach Campaign.

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LEF News Roundup (*continued*)

first year, the foundation, led by President Rosalie Griffith, has awarded seven grants and a scholarship for a graduating senior and started a newsletter that will feature outstanding alumni.

Jenks Public Schools Foundation raised more than \$45,000 through its annual foundation dinner and auction. The foundation added a new component to this year's event – an online auction hosted by Bidding for Good, which generated approximately \$8,000 for the foundation. Proceeds benefit foundation programs, including Classroom Grants for Teachers, Vision of Excellence Awards, an employee appreciation banquet, and Junior Achievement/BizTown for all fifth-grade students. The annual dinner and auction event, Treasure Island, was held at the Jenks Aquarium. For information, visit jenksfoundation.org.

The **Putnam City Schools Foundation** is making the holidays brighter for local students by supporting the district's Care Share Program, which provides Christmas presents to needy families. This year, the program is serving nearly 400 families and providing presents to 1,139 children. The Putnam City Foundation supports the effort by providing registration forms and receiving donations through its website.

"Going for the Gold" was the theme of the **Yukon Public Schools Foundation's** 2011 banquet, which featured entertainment and a dinner catered by Yukon High School's culinary arts class. The event honored this year's grant recipients and featured displays by 2010 grant recipients. As an added twist to this year's fundraiser, the foundation invited

attendees to bring their "old gold" jewelry to the event to be donated to the foundation. Working with a gold company, the foundation received the proceeds for each gold item donated plus an additional 15 percent donation from the company.



More than 1,300 high school freshmen participated this fall in Putnam City Schools' Challenge Day, a character development program designed to reduce teasing, bullying and violence. The program, sponsored by the Putnam City Schools Foundation, also boosts students' self-esteem and builds more cohesive and compassionate school communities. For more information on program, visit pcf4kids.org.