



2011-2012 Annual Report

Our Mission

INAPEF serves as a resource to K-12 local education foundations (LEFs) and as a catalyst to increase community involvement for the enhancement of public education in Indiana.

Our Focus

- Opportunities for sharing and learning at annual conference and regional meetings
- Resource for existing and newly forming foundations
- e-Newsletter and web-site (www.inapef.org)
- Education license plate promotion: "Read On"
- Growth through Foundation Development Grants to INAPEF members

Our Successes

INAPEF was formed in 2000 to augment efforts of local education foundations, both to expand opportunities for their students and support existing foundations, and to help communities start local education foundations. Through state-wide and regional meetings, webinars and web information, INAPEF helps foundation staff and volunteers with many aspects of foundation management.

INAPEF's programs and member benefits include:

- Sharing and learning of best practices with other local school foundations
- Affiliate membership in the National School Foundations Association (NSFA)
- Access to *members' only* site at www.inapef.org
- Eligibility for Foundation Development Grants for capacity building
- "Ask INAPEF," an electronic Q & A that provides members instant feedback, catalogued on the website
- Professional development opportunities at our Annual Conference and Regional Meetings
- Free Webinars for Members for additional professional development
- Reduced registration fee at Annual Conference and NSFA's Annual Conference
- e-NEWS sent bi-monthly with education foundation specific ideas and resources
- Education for legislators and policymakers on the role of K-12 school foundations

Indiana's K -12 public school foundations gave an estimated more than \$6 million in 2011 to improve the educational experience for Hoosier teachers and students.

These foundations provide opportunities for donors to give back to their schools by funding teacher and classroom grants, student scholarships, and more. They partner with their schools to enrich the lives of students and teachers every day.



Letter from the President

INAPEF Family:

It is bittersweet that I write this year-end brief, as my final term of board membership expires. After nine years of board membership, I leave the board feeling so fortunate to have been part of the growth of this organization. I've learned so much from so many of you and am inspired daily by the outreach all of you are having in your communities. Each of our foundations is unique with nuances that represent each of our respective communities.

The public education foundation movement is growing throughout the United States and Indiana has been a leader and a model for other state organizations supporting local communities as they build private support for public education. This year, with significant grant funding from Lilly Endowment Inc. and State Farm, our organization launched a capacity-building training for our members that we hope can serve as a model for other states. INFUSE not only provided training on board development and fund raising, it is providing funding for eligible participants to put their action plans into motion. During the next year it will be exciting to witness and hear about their efforts and progress. Already, the participants have accomplished such things as consent agendas, expanded fund raising and the receipt of matching funds, approval for creation of an alumni association, board training on the development process, strategic planning efforts, prospecting task forces, toolkits for board members to name a few (and that's just from November through March). It is the goal of INFUSE to take our foundations to the next level in their operations and fund raising efforts. We hope to see foundations move beyond special events as their primary fund raising strategy to a more personalized one-to-one philosophy and INFUSE is one of the tools we are testing to expand our members' capacity.

Speaking of State Farm, throughout my tenure on the INAPEF board, State Farm has been a gracious and engaged partner. Larry Dollison has provided guidance and active involvement in the idea generation and decision making of INAPEF. I salute State Farm for their belief and engagement in public education and hope that INAPEF may attract other partners with this civic-minded business philosophy.

This year, to respond to balancing our calendars and member input we changed our organization calendar, moving our annual conference to the Fall and regional meetings to the Spring. Feedback from the conference was tremendously positive related to the timing change. We will continue to evaluate and identify the best timing and methods to support members and provide networking opportunities.

During my first go at president in 2007-2009, I was fortunate to lead the team that hired Leah McGrath, our part-time Association Manager. Leah recently announced her resignation, as she pursues work that brings her closer to full-time employment. We all love Leah -- her smile, her humor, her enthusiasm are just a few characteristics that first come to mind. But Leah is bright and can see the big picture, understands the nuances of working with volunteers, cares about process, knows how to manage multiple projects, and has really helped us make legislative connections so we may become part of the legislative dialogue. Before she started with INAPEF, few legislators probably realized we existed, but with her help there is new awareness about our work and exposure about what our organization is trying to do for local communities. She has established procedures and, of course, has documented most of her moves which will help us train a new association manager. Thank you, Leah, for your heart and service. It is our hope to have a new association manager hired by May and we'll keep the membership informed.

I've seen our membership numbers expand from only 40 foundations when I joined the board and now 56 members. This translates to additional dollars providing funds for our public schools. Each year our board members are visiting communities throughout Indiana to discuss the prospect of how an education foundation can help their community. Public education foundations are one vehicle that can help inspire teachers and administrators to be creative, excite the community and ultimately enrich the education experience of students in Indiana. It continues to be INAPEF's desire to grow our network, expand training opportunities for our members, and provide the opportunities for members to grow their organizations.

I have been humbled by the service our members provide to support public schools throughout the state and honored to serve this organization. I'm excited about the future, under the leadership of Nick Boland. Thank you to the INAPEF Board for their volunteer efforts this year. Their energy and vision is exciting and inspirational.

Yours in service,



Lisa Baize

INAPEF Board of Directors & Members

Executive Committee

*Term: 2011-2013

Lisa Baize, Interim President
Wayne Township Education Foundation

Nick Boland, President-Elect
Noblesville Education Foundation

Ginny Hacker, Past President
Washington Twp. Schools Foundation

Christine Isbell, Treasurer
Public Schls. Fndn. of Tippecanoe Co.

Carol Gardiner, Secretary
Richland-Bean Blossom C.S. Fndn.

*Nick Boland will assume role of President on June 1, 2012. Our gratitude to Lisa Baize for serving as Interim for one more year!

Lisa Allen
HSE Schools Foundation
1st Term: 2010-2012

Maria Bond
Mt. Vernon Education Foundation
1st Term: 2011-2013

Larry Dollison
State Farm
Affiliate Member

Cynthia Granger
Anderson Education Foundation
3rd Term: 2010-2012

Marilyn Jones
Hammond Education Foundation
3rd Term: 2010-2012

Ann Millikan
Kokomo Public Schls. Educ. Found.
1st Term: 2011-2013

Janice Montgomery
Bartholomew Cons. Schl. Corp. Found.
1st Term: 2011-2013

Patty Poehler
Decatur Twp. Education Foundation
1st Term: 2011-2013

Ellen Robinson
Lawrence Twp. Schools Foundation
1st Term: 2011-2013

Barb Smolen
Warsaw Education Foundation
2nd Term: 2010-2012

Amy Walker
Public Education Found. Of Evansville
1st Term: 2010-2012

Staff: Leah McGrath
inapef@inapef.org
www.inapef.org

INAPEF Members 2011

Anderson Education Foundation, Inc.
Avon Education Foundation
Bartholomew Cons. School Corp Foundation
Batesville Comm. Schools Educ. Foundation
Beech Grove Education Foundation
Brownsburg Education Foundation
Carmel Clay Education Foundation
Center Grove Education Foundation
Clinton Prairie School Foundation
Decatur Township Education Foundation
Delaware Community Schools Educ. Found.
East Allen Co. Schools Educ. Foundation
Eastern Hancock Education Foundation
Educ. Foundation of Taylor Comm. Schools
EVSC Foundation (Evansville)
Foundation of Monroe Co. Comm. Schools
Frankfort Education Foundation
Franklin Comm. School Corporation
Franklin Township Education Foundation

Affiliate Member: State Farm

Goshen Community Schools Foundation
Greenfield Central School Foundation
Hamilton Heights Education Foundation
Hamilton SE Schools Foundation
Hammond Education Foundation
IPS Education Foundation
Kokomo Public Schools Foundation
Lake Central Education Foundation
LaPorte Educational Dev. Foundation
Lawrence Township School Foundation
Lebanon Educational Foundation
Merrillville Education Foundation
Mt. Vernon Education Foundation
Munster Education Foundation
New Albany-Floyd Co. Educ. Foundation
New Harmony School Foundation
Ninevah Henley Jackson Ed. Foundation
Noblesville Schools Educ. Foundation
Penn-Harris-Madison Educ. Foundation
Perry Township Education Foundation
Pike Township Educational Foundation

Plainfield Comm. Sch. Legacy Foundation
Plymouth Education Foundation
Portage Township Education Foundation
Public Educ. Foundation of Evansville
Public Education Foundation of Valparaiso
Public Sch. Foundation of Tippecanoe Co.
Richland-Bn Bloss. Comm. Sch. Found.
School City of Hobart Educ. Foundation
School City of Mishawaka Educ. Found.
South Hancock Education Foundation
South Putnam Comm. Educ. Foundation
Springs Valley Education Foundation
The Public Educ Foundation (South Bend)
Vigo County Education Foundation
Warren Arts & Education Foundation
Warsaw Education Foundation
Washington Twp. Schools Foundation
Wayne Township Education Foundation
Westfield Washington Educ. Dev. Found.
Zionsville Education Foundation

56 members

Membership dues are paid annually in January, and are based on foundation revenue:

\$125 for revenue totaling \$0-35,000

\$325 for revenue totaling \$100,001 - \$250,000

\$225 for revenue totaling \$35,001 - \$100,000

\$425 for revenue totaling \$250,001+

2011-2012 INAPEF Financial Report

Administrative Year June 1, 2011 - May 31, 2012

Income	<u>Budgeted</u>	<u>Actual</u> As of 4/13/12	Expenses	<u>Budgeted</u>	<u>Actual</u> As of 4/13/12
Membership Dues	\$11,000.00	\$12,430.00	Association Manager	\$13,000.00	\$11,915.00
Contributions & Grants	\$7,500.00	\$7,575.00	Administrative / Other	\$300.00	\$167.30
Sponsors & Exhibitors	\$5,500.00	\$5,150.00	NSFA Membership	\$2,000.00	\$1,500.00
Conference Registration	\$3,700.00	\$4,175.00	Conference (Food, Speaker, Rental, Reception, Printing)	\$2,350.00	\$2,196.75
*Release from Restrictive Funds	\$57,500.00	\$11,406.34	NSFA Conference Costs	\$1,000.00	TBD
TOTAL	\$85,200.00	\$40,736.34	Regional Meeting Expenses	\$400.00	TBD
NOTE: INAPEF is on track to stay within budget goals for income and expenses for the 2011-2012 Administrative Year, which ends May 31, 2012. *The "Release from Restrictive Funds" represents the Lilly Endowment Inc. and State Farm grants which were dedicated for the INFUSE program. In May, INAPEF will award nearly \$50,000 in Foundation Development Grants to the 12 <i>INFUSE</i> participants. This is possible because of the generous support of State Farm and Lilly Endowment Inc.!			Foundation Development Grants	\$50,000.00	TBD
			Web Hosting Fee	\$200.00	\$425.00
			INFUSE Program	\$15,000.00	\$11,406.34
			TOTAL EXPENSES	\$ 84,250.00	\$ 27,610.39

Account Balance as of April 13, 2012 = \$111,469.33

Fall Annual Conference, Spring Regional Meetings and NSFA Member Webinars: Each year we strive to provide enhanced opportunities for learning and sharing among our members. This year, we moved our Annual Conference from the Spring to the Fall. Matt Tully, Author and Indianapolis Star Columnist, gave the keynote address to the 90+ members in attendance. The Regional Meetings (now in the Spring) have again been expanded to a three-hour format with lunch to accommodate speaker presentations and time for roundtable discussions. Harry J. Vande Velde III, CEO and President of the Legacy Foundation is presenting in the North on "*Board Recruitment*." Matt Judge of The Registration System will be joining the combined Central-South Region to speak on "*Volunteer Management – How to Turn Volunteers Into Your Fan Club*." These events would not happen without our sponsors, especially Major Saver, and volunteers who give their time, of note: Annual Conference host Ginny Hacker (Washington Twp.) and Regional Meeting hosts: Gail Rodovich (Hammond) and Patty Poehler (Decatur Twp.).



In 1998, the state legislature created the Committed to Education License Plate. Originally a Garfield design, the license plate has been updated. The **Read On** design made its debut in January 2011. For each plate sold, \$18.75 goes to the designated K-12 education foundation (or, if there is no education foundation, the dollars go to the designated local school corporation), and \$6.25 goes to the Indiana Dept. of Education to support elementary counseling programs. For more information go to: www.inapef.org



INAPEF has been a member of NSFA since 2007. All INAPEF members are also Affiliate Members of NSFA. For more information, go to: www.schoolfoundations.org

INFUSE & INAPEF Foundation Dev. Grants

In 2011-2012, INAPEF received a \$50,000 grant from Lilly Endowment Inc. and \$15,000 from State Farm Insurance to pilot a capacity-building training program, called **INFUSE**. The INFUSE program was designed to provide foundation leaders with the organizational structure, leadership, and fundraising skills to position themselves as a pivotal fundraising force for their public school districts, during the most transformational K-12 educational funding cuts in decades.

Program Overview

In response to the 2010 Membership Survey and observations by INAPEF leadership, INAPEF partnered with The Fund Raising School to present an intensive 2-day program in the fall, followed by a 1/2 day follow-up program in the Spring, both of which an executive director and board member (or 2 top leaders in a volunteer-driven foundation) were required to attend together.

Intended Training Outcomes: Participants will...

- Consider their foundation's role in the school district's future.
- Consider how to make a significant impact on public education in their community.
- Develop a plan and organizational structure to be more effective in the future.
- Have tools to fund raise more effectively.
- Create an initial action plan to take steps toward building their capacity.

At the conclusion of training in March, participants were invited to submit Foundation Development Grant proposals for matching dollars up to \$5,000 to help further their efforts.

INAPEF is excited about the success of this program so far and the progress participants have made. We hope to replicate this program in future years.

2011-2012 **INFUSE** Participating Foundations

Anderson
Education Foundation

Avon
Education Foundation

Bartholomew Consolidated
School Foundation

Beech Grove
Education Foundation

Center Grove
Education Foundation

Delaware Community Schools
Educational Foundation

Franklin Township
Education Foundation

Kokomo Public Schools
Education Foundation

Lake Central
Education Foundation

Mishawaka
Education Foundation

Mt. Vernon
Education Foundation

Public Schools Foundation
of Tippecanoe County

History

Founders

Martha Schrader

Public Schools Foundation of
Tippecanoe County

Ginny Hacker

Washington Township Schools
Foundation

The first gathering of Indiana's education foundations was held in 1996 in Lafayette. Martha and Ginny got the idea of starting a state association after attending a similar meeting of education foundations in Illinois.

"Never doubt that a small group of thoughtful, concerned citizens can change world. Indeed it is the only thing that ever has." -Margaret Mead

Past Presidents

Bruce Reynolds

Carmel Education Foundation
INAPEF President 2001 - 2003

Christie Love

Lawrence Twp. School Foundation
INAPEF President 2003 - 2005

Amy Walker

Public Education Found. of Evansville
INAPEF President 2005 - 2007

Lisa Baize

Wayne Twp. Education Foundation
INAPEF President 2007 - 2009

Ginny Hacker

Washington Twp. Schools Foundation
INAPEF President 2009 - 2011

Lisa Baize

Wayne Twp. Education Foundation
Interim President 2011 - 2012

Thanks to our sponsors and exhibitors who make our efforts possible.



\$7,500 for Members Grants

Lilly Endowment, Inc.

\$50,000 Grant



\$2,500

*@alles*TEK, Inc.
Everything Technology

In-Kind Web Support

**Premier Conference
Exhibitors - \$500**

Central IN Community Foundation (CICF)

GFS (Gordon Food Service)

Harlem Wizards Entertainment Basketball

iModules

Sodbuster LLC

**Corporate Conference
Exhibitors - \$250**

***SpinWeb
Rocky Ripple Clayworks***

**Virtual Conference
Exhibitors - \$150**

***Cascade Data Services
(Donation Director)***

**Non-Profit Conference
Exhibitors - \$150**

***Central Indiana Educational
Services Center (CIESC)***

***IN Association of School
Principals***

The Indiana Association of Public Education Foundations
Working Together...Building Partnerships...Making a Difference
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