



“Eventing” yourself to death: Making the switch to an annual drive

Kristin Zastoupil

Corsicana Education Foundation Executive Director

Board 2 Board, Austin, TX – December 10, 2015

May 2012 Situation Synopsis

- 10th year
- Funds had dropped from \$199K at peak to \$105K/year
- Grant cycle from \$50K to \$25K, 2/year to 1/year
- Golf tournament 9th year & 1st gala set for September 2012, tons of affinity programs
- 27 voting board members that were tired
- CEF hired ED outside ISD 2008-2010, moved back to ISD in 2011



I HATE
CHANGE
AND I
CAN'T
KEEP CALM

Evaluation

- Board started in August 2012 on their own
- Foundation Innovation August 2013 & 2014
- 3 year process that's still evolving





5 Focus Areas for Change

1. **Staff Structure & Management**
2. **Board of Directors**
3. **Policies/Procedures**
4. **Fundraising**
5. **Programs**

I like progress
but I hate
change.

Jon Bon Jovi



Staff Structure/Management

- ED moved back to ISD in 2011
- New ED hired May 2012
- In 2012, Part-time, salaried Assistant Executive Director
- In fall 2015, restructured again for hourly = additional \$10,000 to district as District Grant (used at ISD Board discretion to offset ED as ISD employee)



Board of Directors

- May 2012
 - 27 voting members
 - meetings every month or 2/month
 - President served 1 year term
- Now
 - 19 voting members
 - 16 Advisory Board (non-voting)
 - Meetings 8/year (Aug, Sept, Nov, Jan, Feb, March, April, June)
 - President can serve 2 year term
 - No event setup (gala and banquet)
- Things we didn't change
 - Superintendent and ISD Board of Trustees Rep are voting
 - Voting members can serve two 3-year terms



Policies/Procedures

- Bylaws changes
- Investment in donor management software
- Creation of Menu of Giving
- Annual Drive Training



Fundraising

- Trial & Error – Golf Tournament & CAST
- Affinity programs kept to a minimum (Whataburger & Amazon Smile)
- Jean Days
- North Texas Day of Giving & Giving Tuesday
- C&B Seen Gala
- Trusts/Family Foundations



Fundraising to Stewardship: 7+ Touches

1. **Annual Drive** phone call/letter with Menu of Giving from Board (January + February)
2. Grant Recap in pictures (March)
3. Invite to Top 10% Banquet (April)
4. Invite to Grant Awards (May)
5. Grant Recap e-news/letter (July/August)
6. **C&B Seen Gala** (October)
7. Thank you phone call/letter from ED (November)
8. **End of Year Letter** (December)



Programs – EXPANDING!

- Grants – More \$, new teacher grants
- Top 10% Banquet
- Campus Celebrations (changed)
- End of Year Awards

CEF Historical Financial Comparison

	Fiscal Year	Gross Receipts (990)	Liabilities & Equity (Net Worth on Aug. 31)	Endowment (Aug. 31)
2002	9/1/02-8/31/03	\$52,031	No data; prior to CPA bookkeeping	\$18,799.94*
2003	9/1/03-8/31/04	\$161,360		\$63,062.41
2004	9/1/04-8/31/05	\$112,495		\$98,439.13
2005	9/1/05-8/31/06	\$199,525		\$155,792.64
2006	9/1/06-8/31/07	\$157,526		\$216,940.37
2007	9/1/07-8/31/08	\$137,052		\$241,022.60
2008	9/1/08-8/31/09	\$138,125		\$213,161.59
2009	9/1/09-8/31/10	\$141,822		\$197,549.97
2010	9/1/10-8/31/11	\$119,938		\$231,425.29
2011	9/1/11-8/31/12	\$106,859	\$267,132.94	\$230,395.42
2012	9/1/12-8/31/13	\$158,470	\$302,663.24	\$278,831.96
2013	9/1/13-8/31/14	\$185,216	\$454,648.97	\$368,404.25
2014	9/1/14-8/31/15	\$215,588	\$401,210.17	\$362,094.37

11/30/15 \$102,616.60 \$450,075.38 \$378,302.97

*Endowment began 12/26/2002.

Last deposit to endowment of \$20,000 made in September 2011.

Results

We have a quorum at every meeting, and I get email responses!

Very positive feedback from donors. Strangers walking in to give us \$ based on what they're hearing in the community.

Staff drive increased from \$700/month to \$1100/month.

Lost 0 donors last year.

Donor base increase by 20% this year.



Presentation available at:
www.cisd.org/kristinz

Kristin Zastoupil

kzastoupil@cisd.org

(903) 602-8133