

AUGUST 2023

FOUNDATIONS TODAY

e-Newsletter



Stay Tuned for Details on our 2024 Conference in Tampa, FL!

We are currently hard at work planning our 2024 Conference, which will be located in beautiful and sunny Tampa, FL! Stay tuned as details develop, as you will be the first to know. We will post details on our website and social media as we draw nearer to 2024, and we will notify members and non-members of updates via email. Don't miss out!

EVENTS

[It's Time to Think BIG!](#)

October 17, 12:00-1:30 PM Webinar

[CEFL Certification Program Registration](#)

April 23- November 19 Registration, Online Asynchronous

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INDUSTRY ARTICLES & NEWS

The New Kid on the Foundation Block

By [Blake Thompson](#)



Blake R. Thompson is the new Executive Director of the Bennington Public Schools Foundation. Blake brings with him 12 years of experience in education, administration and leadership. He is currently in the CEFL Cohort. Blake also has extensive experience in fundraising, non-profit work, and his children attend Bennington Public Schools, which all complement this new position with the Foundation.

“I’m very excited to work with an experienced team to continue to provide various resources for students and staff in the BPS District. I’m thrilled to work for the district that my children attend and in which we live! I’m excited to work for a collaborative board and community to continue to grow the organization towards great achievements.”

We remember it from when we were in elementary school, right? Being the new kid in the lunchroom and not knowing where to sit or who to sit by. Seeing the new kid come into the classroom and looking for their desk with no clue where to go. All of these memories came flooding back as I sat in my new

office as the new Bennington Public Schools Foundation Executive Director. The hype and excitement of announcing my new position and transitioning from my former job was over. Now it's time to prove myself and answer that ailing question was hanging over my head. "Am I cut out for this job?!"

No matter what the transition is in life, we've all been there in one form or another. It's just a matter of knowing how to navigate the environment in which we are in, which seems simple, right? Obviously the board and those who hired me felt I was qualified, as did I, but a new job is still a new job. I came from an education and leadership background and had worked with many non-profits in a volunteer capacity, but didn't have direct experience in this environment or this specific role.

So, as I sat at my desk and looked around, I asked myself what the next step was. So much of this role is building relationships and understanding processes, none of which would happen by themselves or were tasks that could be conquered immediately. I started sifting through documents trying to understand a few pieces. I was lucky that the person I was replacing was in good standing and willing to answer my questions, go to lunch, and leave me notes. People would ask me "How do you like the new gig?" I of course would answer that I was enjoying it, but deep down I knew "I still had no clue what I was doing and wasn't feeling as effective as I knew I could be."

I'm just over a month into the job and those who have been in a similar position will say "He's got a lot to learn, he's just getting started." While this is true, there were two pivotal turning points over the transition that led to me being able to say "I am going to love this and I can see the difference we are making!" versus "I still have no clue what I'm doing." So what were those pivotal moments?

Initiating team staff meetings and running my first board meeting. That's it! While these seem like regular tasks for running an operation, being at the helm of leading them in a new role can seem daunting. You of course want to follow protocol and not fix what isn't broken, but you also want to put your own twist and individualization on these pivotal moments to prove yourself. How do you do that? What's the special recipe?

My time in education and leading both students and adults has taught me that the answer is simple: Be yourself and trust who you are. Knowing that these are pivotal moments is important, but giving a straight answer on how to

personalize and prove yourself isn't. You have to take what you've gained in transition moments (such as being the new kid on the block) and add those experiences to your pivotal moments. Take one step at a time, trust the process, learn from others, and breathe.

I have been fortunate to be surrounded by welcoming colleagues. I've also chosen to submerge myself into training and put myself out there to meet others in the industry. I figured this is the relationships component that I can't force, but I can certainly start networking. While this may be uncomfortable at times, it is often when we grow the most.

While I'm not the new kid to education or leading others, I'm still very much the new kid on the foundation block. I by no means have all of the answers, but have grown throughout the recent transitions and will continue to do so. One thing I know for sure is, when I see a new employee looking for a place to sit at lunch, I will invite them to my table!

Predicted and Still Scary-Philanthropy in 2023

By [Randall Hallett](#),
Ed.D., JD, MBA, BS,
CFRE



Randall Hallett is the CEO and Founder of Hallett Philanthropy, a full-service consulting firm. Having spent his entire career in philanthropy, Randall has a passion for helping organizations seek funding to meet their mission, and believes giving is good for one's emotional and physical well-being.

Randall holds a Bachelor's degree in business, a Master's Degree in Business Administration, a Juris Doctorate (Law Degree), and an Educational Doctorate in leadership. He also has his Certified Fund-Raising Executive (CFRE) certificate. Randall's recent effort as an industry thought leader is his latest book [Vibrant Vulnerability: Mastering Philanthropy for Today and Tomorrow's Healthcare CEO](#), which delves into the relationship between fundraising and non-fundraising CEO's.

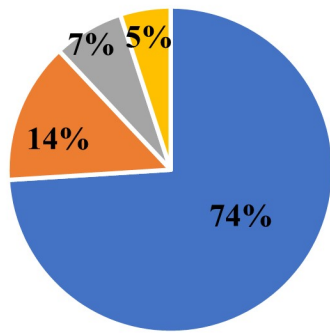
June not only brings the end of the school year and summer, but it also allows for the annual announcement of the totality of philanthropy in the United States

from the previous year. The work done by Giving USA, in concert with the Lily School of Philanthropy, is the most comprehensive look at how fundraising occurs within the country. A certain must read for anyone in the nonprofit sector.

And yet while 2022 may have been somewhat predictable in terms of the timing of the report delivery, the results are a little scary. For the first time in a number of years, overall giving dropped 3.4% from 2021 (to \$499.33 billion). If you figure in inflation, that equates to a 10.5% reduction in giving overall across the United States. As a part of the total philanthropy comparisons, Giving USA also illustrates how much philanthropy is part of the gross domestic product of America. Just two years ago, philanthropy made up 2.41% of all economic activity. In 2022 it dropped to just 1.8%.

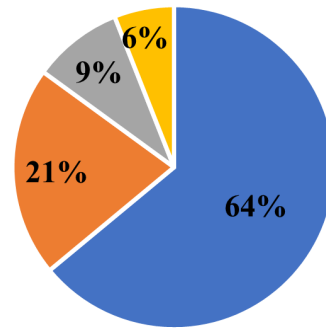
And even more frightening, numbers indicate that less than 47% of the households in the United States made ANY gift at all to ANY charity during 2022. This can also be seen by the dramatic drop in the last ten years of the total number of dollars now coming from individuals. While just a few years ago the number was more than 74%, in 2022 that number dropped to 64% of all dollars being contributed by individuals. (NOTE-bequests are measured separately and not included in individual giving even though “individuals” make bequests—that would be additional dollar given). Complicating this change to individual giving is the lopsidedness of what are considered “mega gifts.” Gifts of \$500 million or more accounted for 5% of all the giving of all of the individuals in 2022. In fact, 3% of all charitable gifts, or nearly \$14 billion, came from just six individuals and/or couples. And while not reported formally, many nonprofits are seeing an erosion of middle level donors, leaving most donors in only two categories: the small group who make up as much as 90% of the donated dollars and the large group of people who made smaller gifts that may only total 5 or 10% of all dollars a nonprofit receives.

2012



■ Individuals ■ Foundations
■ Bequests ■ Corporations

2022



■ Individuals ■ Foundations
■ Bequests ■ Corporations

“Households were heavily impacted by economic uncertainty, the threat of recession, inflation, and changes in the stock market – and in turn, individual giving took the biggest hit of all in 2022,” Wendy McGrady, the secretary/treasurer of Giving USA Foundation and executive vice president and COO of The Curtis Group, said in a statement. “While in 2020 and 2021, giving was buoyed by stock market performance, in 2022, it appears individual donors were impacted by changing economic conditions.”

Best way to think about this, at a micro level, is that if you have 10 donors who gave you \$100 apiece in 2021, there is a very small chance that all of them increase their giving by \$8 to account for the inflationary pressure/rate. Magnify that over thousands or hundreds of thousands of dollars from 2021, a nonprofits reduction in philanthropic revenue for 2022 becomes more real and impactful.

While the reporting is important, the real question is “what should we do to overcome these challenges?”

1. Keeping your donors, not losing them, is key. Ensuring a proper relationship and solicitation for those who have given before is only part of the challenge. People's repeat giving comes from when they know the money was used effectively. Make sure to steward donors with messages of impact and value so when they are solicited again, they know the money has real impact on people's lives.
2. Be specific in annual giving efforts and ask for a little more than a donor gave last year or the year before. The ability to appropriately segment and individualize solicitations, in particular through old fashioned snail

mail as well as digital, is quintessential in overcoming part of the challenge. If someone gave \$100 in 2022, ask them for a very specific increase for the same cause they demonstrated an interest in sometime in the past. Don't be afraid of the challenge of inflation.... address it head on.

3. Your Board and their responsibilities have never been more important. If less than half the population is making a charitable gift at all to any nonprofit, your board's ability, amongst other key volunteers, is essential in ensuring that those who are interested are connected appropriately to your Foundation. The days of sitting and reading financial reports in Board meetings are over. Board participation, while including legal responsibilities, must come after board member's ability to communicate and connect with individuals in the community.
4. If engaging in/running a capital campaign or looking at individual funding efforts, it is critical to properly identify and connect to the smaller and smaller group of people, or organizations, who will make up as much as 95% of all the dollars a nonprofit receives in a campaign. The concept of finding 1000 people to give \$1000 has forever died and being left in the scrap heap of past ideas. Without the top 10 to 15 key donors, campaigns will not succeed.
5. Tactically, consider spreading out people's payments over a longer period of time. It might be easier for someone to make a campaign pledge over three or four years rather than one or two years. In the annual giving realm, getting someone to give \$10 per month might be easier than having them give \$100 all at one time. Present as many options as possible to maximize someone's ability to give to your Foundation.
6. Ensure the strategic alignment with the superintendent and school board. If there are less donors and less dollars available, the items or causes that the Foundation does support have to be the most important and most impactful. Maximization of philanthropic dollars within the district or school has to be a priority.

While the 2022 numbers are only weeks old, in terms of being reported, they're already estimates for philanthropic giving for 2023. In analysis by the [Chronicle of Philanthropy](#), they estimate that gifts of \$1,000,000 or more in the first five months of this year equate to about \$5.2 billion from 213 individuals, couples, or organizations. That's down from the same time in 2022 by some 20% in both the number of \$1,000,000 gifts and the total number of dollars coming from them. And in early reporting, the organization [Candid](#), which tracks foundation giving, indicates that a number of foundations are already signaling

a decrease in their philanthropic support because of an inconsistent stock market and overall economy.

Thus, it has never been more important to build deeper, more meaningful relationships with donors who believe in the value of primary and secondary education. And to engage key leaders, influencers, and board members who can bring great credibility to the relationships that Foundations will need to be successful going forward.



**Authentic Leadership,
Empowered Youth:
Launching a Student
Advisory Committee at the
Gloucester Education
Foundation**

By [Emily Siegel](#)



Emily Siegel is the Executive Director of the Gloucester Education Foundation. Emily has devoted 20 years to working in education programming and policy, community development, and nonprofit leadership.

She is a graduate of the University of Michigan, and holds an M.Ed. from Lesley University and a certificate in nonprofit management from Boston University. She is fortunate to live in a magical place - Gloucester, MA - with her husband, also a local nonprofit Executive Director, and their two children, Jonah and Bayla.

Since its founding in 2005, the Gloucester Education Foundation (GEF) has sought to include students in its work. Through student focus groups, recruiting student volunteers to work at GEF events, and informal conversations with young people in our city - usually the children of board members and donors - our organization felt tapped into youth perspectives.

Sort of.

It was clear by 2021, however, that 16 years into our existence we needed to more consistently engage students, and we had to reach beyond our existing networks. Board member Anna O'Connor - a retired educator - was an advocate for creating a formal Student Advisory Committee, inspired by the [NAEF webinar "Student Leadership on Education Foundations"](#). But with just one full-time staff member and a pandemic to contend with, GEF had limited capacity to execute on this idea.

Enter Rebecca Dowd, a Gloucester High School (GHS) alumna and Wesleyan University sophomore. Rebecca had been active in GEF-funded programming during her K-12 years, and interned with GEF in 2021. She devoted a summer to the Student Advisory Committee: researching models, meeting with GEF and GHS leaders, talking to peers about how it might work. She determined that we needed a representative cohort of students invested in improving their schools, committed to working with a nonprofit alongside adults. Their involvement had to deepen GEF's efforts; it couldn't be a token committee that wasn't empowered to do authentic work. Our board and staff had to be open to listening to these young people, making space for their views.

After tweaking Rebecca's materials, in February 2022 we launched our [Student Advisory Committee](#), selecting a first cohort of advisors from a field of 24 students nominated by Gloucester High School staff: five juniors and one freshman. We imagined they would join board committees and each be assigned a board member as a mentor right away. Quickly, with the help of a youth development consultant, we realized this wasn't the right place to begin. Too intimidating, for both the students *and* our board!

Instead, we opted for a slower approach, building the students' ability to reflect critically on their school experiences and asking them to share their stories with our board. They mapped their K-12 careers against our program investments, identifying moments when a GEF-funded initiative impacted them. They practiced talking about GEF and gained comfort speaking about our mission, history, and programs. Armed with these skills, they became GEF ambassadors, advisors, and assistants. We learned where each excelled and

could contribute, and during SY2022-23 they embraced individualized projects including:

- Meeting with teachers to “workshop” potential programming ideas
- Reviewing proposals and providing insights to our board to inform its funding decisions
- Participating in site visits and a funding pitch with donors
- Serving on the [Gloucester Student Arts Festival](#) planning committee
- Identifying under-utilized resources and catalyzing a new Makers’ Club as a result
- Recruiting students to volunteer at GEF events, doubling what we’d seen in past years
- Creating and delivering a session to teachers about how to apply for GEF funding
- Presenting to the Gloucester School Committee about GEF’s FY23 impact

Our inaugural cohort of Student Advisors took on more than we anticipated, increasing our organizational capacity and uncovering ideas we hadn’t previously considered. We didn’t get everything right, and they’ve given us feedback to consider before we bring on a second group this fall - a testament to their critical thinking skills. By working with our Student Advisors, GEF has become a more youth-centric organization that is making better-informed decisions about where to put our resources.

Key Takeaways

1. **Assemble a diverse group that represents different interests and identities:** many perspectives were represented in our pilot cohort and they weren’t all “the usual suspects” that are typically selected for leadership positions
2. **Go slow, but not too slow:** one piece of feedback from the students was that they wanted to jump into substantive projects sooner, but our staff recognized that they needed an extended orientation to prepare for that. We’ll seek to find a happy medium next round, incorporating some of the activities we did in their first semester into the application process.
3. **Compensate students:** the decision to provide a stipend for our Advisors was controversial for our board, as some felt it didn’t fit with our vision of student volunteerism. But it felt important that GEF not inadvertently perpetuate the divide between the “haves” and “have nots” in our socioeconomically diverse city, which can widen through

practices like unpaid internships. We paid \$300/semester/student, which felt meaningful but feasible.

Developing Strong Operational Leadership: Key Strategies for School and District Leaders

Reprinted from [Grounded Education Solutions LinkedIn](#)

Operational leadership plays a crucial role in the success of schools and districts. As educational leaders, it is essential to not only focus on instructional leadership but also master the art of effective operational management. Strong operational leadership ensures that the administrative aspects of education are efficiently handled, allowing educators to focus on what matters most: providing a quality learning experience for students. In this article, we will explore three key strategies that school and district leaders can employ to develop strong operational leadership skills.

1. Streamline Processes and Systems:

Efficient processes and systems are the backbone of any successful organization. As a school or district leader, it is vital to identify areas where operational inefficiencies exist and take proactive steps to streamline them. By optimizing administrative workflows, you can save valuable time, reduce unnecessary expenses, and enhance overall productivity.

Start by conducting a thorough assessment of your existing processes. Identify bottlenecks, redundancies, and areas where paperwork or manual tasks can be automated. Integrate technology solutions that align with your organization's needs and goals. Consider implementing a robust school management software system encompassing student information systems, attendance tracking, grade management, and communication tools. This will centralize data, facilitate collaboration, and streamline administrative tasks, freeing up time for leaders to focus on strategic initiatives.

Additionally, establish clear and standardized procedures for routine tasks such as budgeting, purchasing, and HR processes. Document these processes and ensure they are accessible to all relevant staff members. Encourage feedback from your team to refine and improve operational workflows continually. By creating a culture of efficiency, you can foster a productive and streamlined environment throughout your school or district.

2. Foster Effective Communication and Collaboration:

Effective communication and collaboration are fundamental for operational success in educational institutions. As a leader, it is essential to establish open lines of communication with staff, parents, students, and other stakeholders. Transparent and timely communication promotes trust, strengthens relationships, and ensures that everyone is aligned with the organization's vision and goals.

Implement a comprehensive communication strategy that includes regular staff meetings, newsletters, and online platforms for sharing information. Encourage two-way communication by actively seeking feedback from your team and providing opportunities for them to voice their opinions and ideas. Embrace collaboration tools that facilitate virtual teamwork, making it easier for staff members to collaborate on projects and share resources.

Develop strong relationships with parents and the community through regular communication channels. Host town hall meetings, parent-teacher conferences, and community events to create opportunities for dialogue and engagement. Actively listen to feedback and concerns, and demonstrate your commitment to addressing them. By fostering effective communication and collaboration, you create a supportive and engaged community that contributes to the overall success of your school or district.

3. Invest in Professional Development:

Continual professional development is a cornerstone of effective operational leadership. As a leader, it is crucial to invest in your growth and that of your staff members. By providing opportunities for professional learning and growth, you not only enhance individual skills but also cultivate a culture of continuous improvement within your organization.

Identify the specific areas where your staff would benefit from professional development. This could include topics such as strategic planning, financial management, data analysis, or organizational leadership. Offer various professional development opportunities, including workshops, conferences, webinars, and online courses. Consider partnering with external organizations or consultants specializing in educational leadership to bring fresh perspectives and expertise to your team.

Encourage a growth mindset within your organization by promoting self-reflection, goal-setting, and peer-to-peer learning. Establish a mentoring or coaching program that pairs experienced staff members with those seeking to

develop specific skills. Create a supportive environment where professional growth is celebrated and rewarded.

Developing strong operational leadership is crucial for school and district leaders who aspire to create high-functioning educational institutions. By streamlining processes and systems, fostering effective communication and collaboration, and investing in professional development, leaders can establish a solid foundation for success. Remember, operational leadership is not just about managing tasks; it is about creating an environment where educators can thrive, and students can excel.

Finding Your Assistant Principal Identity

Reprinted from [ASCD](#)

At the outset of his latest book, [The Assistant Principal Identity](#), well-known school leadership expert Baruti Kafele acknowledges that he has a “near obsession” with the assistant principal position.

When I asked him about this in a [recent interview on the ASCD Connect podcast](#), Kafele said that his deep interest in the position goes back to the time when he was an AP himself and found himself thrust into a disciplinarian role that left little time for instructional leadership.

Kafele said this kind of miscasting of assistant principals is endemic in schools and squanders the talents of these individuals, who tend to be experienced instructional experts. “We need to start rethinking—reimagining if you will—what the role of the assistant principal is,” he said. This means refining school organizational cultures—and their often-fragmented approaches to student discipline—so that the AP can be “that instructional leader, that instructional coach that

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the children and the staff require and need them to be.”

We need to start rethinking—reimagining if you will—what the role of the assistant principal is.

At the same time, Kafele said that assistant principals’ ability to remake the position and thrive in it is also highly dependent on the development of their own inner attributes. One of the most critical of these, he stressed, is “protecting your authenticity, who you are.”

Kafele explained that, amid all the competing challenges and pressures of the job, it’s very easy for assistant principals to “lose themselves”—to forget or downplay their values, their talents, and their original aims for their role. To avoid this, APs need to be “very intentional” about remembering why they took the job in the first place and what value they hoped to add to the school. “You can’t get to a point where you lower expectations,” either for yourself or for students, he said.

Kafele added that, as part of this process, APs need to do the critical work of defining and establishing their own leadership identity. (His own, as anyone who’s heard him speak won’t be surprised by, is “The Motivator.”) “Keep in mind,” he noted, “that your professional identity is directly rooted in your personal identity. You can’t morph into someone you’re not.”

In the course of our conversation, Kafele also offered some tips on how principals can better support APs (an essential component of school management and staff development, in his view) and how newly appointed APs can best prepare for the job. That’s a question he acknowledged is coming up a lot in these days of increasing leadership-team turnover in schools.

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