

DATE: April 10, 2012
TO: Board of Trustees
FROM: Edgar Schmidt, Superintendent of Schools
SUBJECT: Continuation of Edmonton Public Schools Foundation
ORIGINATOR: David Fraser, Executive Director, Corporate Services
RESOURCE STAFF: Alva Shewchuk, Sandra Woitas
REFERENCE: October 25, 2011 Board Report

ISSUE

When the Edmonton Public Schools Foundation (EPS Foundation) was established, the Board approved a three-year allocation which ends August 31, 2012. A decision needs to be made with respect to providing financial support to the EPS Foundation in the future.

RECOMMENDATION

That the District continue to provide an allocation to support the friendraising and fundraising efforts of the EPS Foundation.

BACKGROUND

At the February 12, 2008 board meeting, the Board approved that a district-level foundation be established and provided with an allocation for staffing and basic operating expenses. As outlined in the October 25, 2011 board report (Attachment I), the purpose of the EPS Foundation is to:

- inform the community of the value of a strong public education system and the critical role elected officials play in advancing public education;
- complement the efforts of the Board of Trustees in broadening and deepening support for Edmonton Public Schools, particularly among the 70 per cent (*now 80 per cent*) of Edmontonians who presently do not have a direct link to public education;
- share stories about the teaching and learning occurring in district schools; and
- offer community members the opportunity to support teaching and learning through a variety of contributions – financial, in-kind donations and gifts of time.

The October 25, 2011 report also provides a summary of the funds raised since the launch, as well as an overview of the current priority of the Board of Governors, relationships that have been cultivated and the fundraising activities that have been undertaken.

RELATED FACTS

The current priority of the EPS Foundation is focused on raising friends and funds to support full-day Kindergarten programming at schools whose students are deemed as socially vulnerable and at risk academically. Although the District subsidizes the funding for full-day Kindergarten programming at 21 schools and the EPS Foundation has raised funds to offer the program at three other schools there are 12 additional schools whose students would significantly benefit from full-day Kindergarten.

Since the 2010 launch, the EPS Foundation has raised approximately \$500,000 in multi-year gifts and immediate contributions from individuals, organizations and funding agencies to support early learning programs and full-day Kindergarten programming. A majority of these donations are realized at the annual *Ready for Life* fundraising breakfasts, which are hosted by the EPS Foundation and held at a different high school each year during the month of May.

As a result of these fundraising efforts, a full-day Kindergarten was established at Tipaskan School during the 2010-11 school year and sustained during the 2011-12 school year. As well, in the 2011-12 school year, two more full-day Kindergarten programs were established at Mee-Yah-Noh and Lauderdale schools. Funding allocations are dependent upon the unique needs of each school, but on average it costs approximately \$100,000 per school each year. The funds subsidize the additional expense of each Kindergarten teacher's salary, and in some instances the educational assistant's salary and teaching and learning resources and supports.

Additionally, each year an anonymous donor makes a substantial contribution to support early learning programs (3 ½ to 4 ½ year olds) at schools where the students are deemed most socially vulnerable. In 2010-11 funding was allocated to support the following schools: Balwin, Caernarvon, Delton, Ekota, John A. McDougall, McCauley Transition Centre, Norwood, Sakaw, Sifton, Tipaskan and Youngstown.

Moving forward, the Board of Governors is committed to raising funds to sustain all three full-day Kindergarten programs at Lauderdale, Mee-Yah-Noh and Tipaskan, and funding additional programs at socially vulnerable schools as identified by the District.

Presently, the salaries of the two-member staff (Director Sandra Woitas and Fund Development Associate Alva Shewchuk) and a limited operating budget are covered by an allocation provided by the District. The EPS Foundation office is housed in John A. McDougall School and the school generously provides the staff members with access to space, furniture and equipment at no cost. As well, Central Services departments such as Communications, Financial Services and the Superintendent's Office offer their services as necessary.

For the 2012-13 school year, the EPS Foundation is requesting an allocation of \$400,000 for staffing and operational expenses.

OPTIONS

Based on the aforementioned facts, the following options are selected for consideration:

1. Continue to provide an allocation to support the efforts of the EPS Foundation.
2. Discontinue the allocation to the EPS Foundation.

CONSIDERATIONS & ANALYSIS

Much has been accomplished in a three year timeframe. Through its "show and tell" events and activities, the EPS Foundation has been engaging the community in conversations about the important work of teaching and learning that is occurring in classrooms and the challenges faced by schools deemed socially vulnerable across the District.

This approach is not only ensuring the 80 per cent of the community that has no direct link to the school district is more knowledgeable about public education; it is inspiring individuals and organizations to get actively involved and to make investments in programs and resources that enhance student learning.

The EPS Foundation has been very successful in securing financial support from the community during a time when the competition for donations has increased substantially. This is due in part because Edmonton Public Schools has made its own investment in the EPS Foundation, which has made more palatable for donors to make a contribution.

Over the past few years, non-profit entities are experiencing that individual donors and funding organizations are prepared to invest in programs, but there is a limited appetite in the community to support operational expenses.

A solid foundation for a thriving fundraising entity is in now place. An allocation would mean that all efforts of the EPS Foundation can be optimized and applied to stewardship and program sustainability.

ATTACHMENTS & APPENDICES

ATTACHMENT I October 25, 2011 Board Report: Edmonton Public Schools Foundation
Progress Report (Response to Trustee Request #121)

SBW:ams

DATE: October 25, 2011

TO: Board of Trustees

FROM: David Fraser, Executive Director Corporate Services

SUBJECT: Edmonton Public Schools Foundation (EPS Foundation) Progress Report (Response to Trustee Request #121)

ORIGINATOR: Sandra Woitas, Director Edmonton Public Schools Foundation

RESOURCE STAFF: Alva Shewchuk

REFERENCE: September 27, 2011 Board Meeting (Trustee Ripley)

ISSUE

Annually, the Edmonton Public Schools Foundation (EPS Foundation) provides a summary of activities and results to the Board of Trustees. This report outlines the EPS Foundation's 2010-11 successes, as well as future opportunities and challenges, and includes a financial picture of the funds raised during the school year.

BACKGROUND

In 2008, the Board of Trustees approved a recommendation to create an EPS Foundation to complement the District's current fundraising support system and school-specific fundraising societies and foundations. The purpose of the EPS Foundation is as follows:

- to inform the community of the value of a strong public education system and the critical role elected officials play in advancing public education;
- to complement the efforts of the Board of Trustees in broadening and deepening support for Edmonton Public Schools, particularly among the 70 per cent of Edmontonians who presently do not have a direct link to public education;
- to share stories about the teaching and learning occurring in our schools; and
- to offer community members the opportunity to support teaching and learning through a variety of contributions – financial, in-kind donations and gifts of time.

During the 2009-10 school year, a Director (Sandra Woitas) and Fund Development Associate (Alva Shewchuk) were hired and the EPS Foundation was officially launched in February 2010. The EPS Foundation is housed at John A. McDougall School and has a Board of Governors consisting of board members that include:

- an Edmonton Public Schools' staff member;
- a representative from the Board of Trustees who is assigned to the role each year at Organizational Board; and
- volunteers from all walks of life who represent Edmonton's diverse community.

The Board of Governors' priority is to raise friends for public education and raise funds to support early learning intervention and student success. More specifically, they secure financial

and in-kind donations to supplement the costs associated with early learning and full-day Kindergarten programs for some of the District's most socially vulnerable elementary schools.

CURRENT SITUATION

In the 2010-11 school year, through an extensive cultivation and stewardship process undertaken by the EPS Foundation, over 5,000 community members had an increased awareness about the Edmonton Public Schools system and \$450,000 was realized in contributions achieved through a variety of activities and events.

During 2009-10 and its first year of operation, the EPS Foundation raised enough money to establish a full-day Kindergarten program at Tipaskan School in the 2010-11 school year. Funds raised in 2010-11 ensured sustainability for the full-day Kindergarten program at Tipaskan School and another two full-day Kindergarten programs which were established at Lauderdale and Mee-Yah-Noh schools during the 2011-12 school year. \$120,000 of the total dollars raised was directed to a designated early learning site as per donor's preference.

2010-11 Successes

Over the school year, 19 information sessions were at hosted at John A. McDougall, Evansdale, Youngstown, Montrose and Tipaskan schools. Approximately 350 individuals from the community were invited to come see first-hand the teaching and learning occurring in some of our District's more socially vulnerable elementary schools. At each session, the Director spoke about the purpose of the EPS Foundation and the importance of early learning, a former student shared their experience within the public education system and a school staff member talked about the challenges and opportunities related to their school and student population. Extensive follow-up calls were made to each individual and a handwritten note was sent to each as well.

On November 3, 2010, to celebrate the launch of the full-day Kindergarten program at Tipaskan School, a *Mad Hatters Tea Party* was hosted at the school to showcase how contributions made to the EPS Foundation were used. Over 80 donors, some Trustees, the Superintendent and Board of Governors' members enjoyed a morning of student entertainment and tour of the full-day Kindergarten classroom. On February 17, 2011, 100 parents/guardians and their children enrolled in the full-day Kindergarten program were invited to a family night celebration.

On November 24, 2010, as part of its stewardship approach, the EPS Foundation invited donors and volunteers to an annual *Create in 8 Art Showcase*. During the entire day, students from eight high schools came together to collaborate and create works of art based on the EPS Foundation theme – *Ready for Life!* At the end of the day, at the showcase event, all donors and volunteers were given the opportunity to review and take a piece of artwork as a token of appreciation for their time and/or contributions to public education.

On May 12, 2011, over 275 community members attended the EPS Foundation's second annual fundraising *Ready for Life* breakfast which realized \$200,000 in unrestricted funding support. For a second year, the Royal Bank of Canada Foundation contributed \$50,000, \$40,000 came from EPCOR and an anonymous donor donated \$50,000. One-fourth of the guests had attended information sessions, while others were guests invited by the 30 individuals who hosted tables at the event. The event required an enormous number of volunteer supporters made up of 100 staff, students and Foundation friends. After the breakfast, personal calls were made to thank

individuals for attending the event and for their contribution. In addition, students created thank you cards which were sent to all involved.

Throughout the year, events and activities are undertaken to generate interest in the EPS Foundation and to ensure staff and community members are aware of the multiple needs of our schools. For example: the *Welcome Back* campaign, where 1,000 cupcakes were hand-delivered to staff at a variety of sites; the *Mittens for Kittens* campaign, in which staff and community volunteers are asked to make mittens, hats, scarves and socks for schools in need; and the *Slippers for Sweeties* campaign held at the Centre for Education during the same week of Valentines Day.

As a result of the friendraising and stewardship that occurred during the course of 2010-11, a number of third-party fundraising events and activities were also undertaken by other groups and individuals in support of the EPS Foundation.

On April 27, 2011, Kingsway Mall hosted a *Ready to Shine? Student Fashion Show* to showcase the fashion studies program at the District's high schools to 300 supporters. Nineteen teams of 65 students, from Harry Ainlay, L.Y. Cairns, Jasper Place, M.E. LaZerte and Ross Sheppard participated in the event. School site adjudication took place with representatives from Kingsway Mall, Marvel College and the EPS Foundation. A documentary was filmed of the process and event courtesy of Kingsway Mall. The event was featured in The Edmonton Journal, Global TV live morning remote and the Edmonton Examiner. Oxford Properties matched the number of teams with a donation of \$100 per team for a total of \$1,900. Other partners included Burke Group, Sig Plach Couturier & Fabrics and Marvel College which provided two \$1,000 Fashion Design scholarships to a team from M.E. LaZerte. Due to its success, Kingsway Mall has agreed to make this an annual event.

On March 24, 2011, the Edmonton Twestival 2011 committee chose the EPS Foundation as its charity of choice. This grassroots social media initiative engaged a young demographic of people who use Twitter at their primary communication vehicle. Fifty individuals showed up at the downtown pub location and \$2,400 was realized through a silent auction.

On June 21, 2011, Notables Stationers Inc. celebrated 25 years of business with 250+ customers and supporters. The store has a long history of supporting literacy initiatives and public education and, in keeping with that tradition, 25 per cent of all sales made by the store that day – \$5,000 in total – was gifted to the EPS Foundation.

On June 25, 2011, Terry Sulyma, former Trustee, and his wife held a Summer Solstice at their home. At their annual get together, they encouraged their guests to make a contribution to the EPS Foundation, which resulted in a \$2,100 contribution.

The Bear 100.3 FM radio contributed \$10,000 in total to Tipaskan's full-day Kindergarten classroom. \$5,000 came from The Bear's Children's fund during the launch of the full-day Kindergarten program and another \$5,000 came later in the year as a result of a charity challenge won by Yukon – one of the radio's celebrity hosts. The radio station also provided considerable media attention throughout the year.

As part of the school decommissioning process, Purchasing and Contract Services, Planning and Facilities Operations directed all furniture/equipment sale donations to the EPS Foundation, which resulted in a \$120 contribution.

Partnerships also play a role in promoting the importance of public education. During the year, the EPS Foundation worked closely with the University of Alberta Senate to expand U School from three recipient elementary schools in 2009-10 to seven elementary schools and one junior high school in 2010-11. In total, 240 students benefited from the experience.

Throughout the year, the EPS Foundation staff members served in a variety of capacities on the following boards, councils, associations, etc.: AAFRE (Alberta Association of Fundraising Executives), AFP (Association of Fundraising Professionals); University of Alberta Senate; (Alberta Health Services); Greater Edmonton Region Advisory Health Council; Big Brothers Big Sisters Edmonton; Institute for Sexual Minority Studies and Services (Faculty of Education, Education Policy); Edmonton Community Police Foundation; and Province of Alberta's Great Kids Awards Committee. Such membership has helped raise the EPS Foundation profile in a variety of networks.

In addition, attendance at community events and activities, along with presentations to teaching and non-teaching groups, has increased awareness about the public education system, role of advocacy and importance of early learning and student achievement.

Challenges

Now that three full-day Kindergarten programs have been funded by the EPS Foundation, significant effort will have to be made by the Board of Governors and Foundation staff members to sustain these programs and to secure additional funding to support other schools in need. As a result, the volunteer Board of Governors and the two-member staff group may not be able to keep up with the demands attached to the EPS Foundation's growing fundraising and fundraising efforts.

Opportunities

Believing that it takes a whole village to raise a child, the EPS Foundation's long-term goal is to engage the entire community in the work of teaching and learning at Edmonton Public Schools and has identified the following opportunities for future growth.

- Implementing an automatic payroll deduction option for staff. The process started in September 2011 and will be monitored and refined over the 2011-12 school year.
- Encouraging staff members to host events and activities to support the work of the EPS Foundation. A bottle recycling initiative and garage sale project have recently been initiated by Central Service staff members.
- Creating an alumni council with former members of all staff groups. The option will be investigated and determined if it is feasible.
- Involving district schools to think locally and give locally. Have started to ask high school leadership teams to consider the EPS Foundation as its charity of choice as part of their service to community strategies.
- Pursuing the possibilities of implementing a planned/deferred gifts option.

KEY POINTS

- Over 5,000 community members were introduced or reintroduced to Edmonton Public Schools. This group of individuals is made up of contributors, volunteers and supporters from private and public companies; service agencies and associations; union and trade groups; media supporters; staff members and former staff members; as well as other interested parties.
- Over \$450,000 was raised during the 2010-11 school year; \$120,000 was donated by an anonymous donor and directed to early learning sites and the remaining dollars were directed to full-day Kindergarten programming at Tipaskan, Lauderdale and Mee-Yah-Noh.
- 350 guests attended 19 information sessions between September 2010 and August 2011.
- 275 guests attended the second annual *Ready for Life* fundraising breakfast which realized \$200,000 in contributions; Royal Bank of Canada Foundation contributed \$50,000, \$40,000 came from EPCOR and an anonymous donor donated \$50,000.
- Most of the *Ready for Life* fundraising breakfast donations were one-time contributions from individuals; the largest being a significant memoriam gift from San San Sy who is a member of the Board of Governors. Eight donations were long-term commitments between two and four years; with four donor pledges of \$1,000 per year over a five-year timeframe.
- Tipaskan, Lauderdale and Mee-Yah-Noh schools received funding during 2010-11, which means 75 Kindergarten students will benefit from full-day Kindergarten programming.
- Currently, Lauderdale School is being funded by the Edmonton Oilers Community Foundation, which provided a five-year commitment of \$300,000; in 2011-12 the EPS Foundation received its first installment of \$100,000.
- Plans are underway for staff to make contributions through an automatic payroll deduction option; and an alumni council of former staff members and a planned/deferred gifts option are being considered.

SBW:ams