



California Charter
Schools Association

Fundraising Like a Pro – Tips for New School Fundraisers

Presented by California Charter School Association staff



TODAY'S AGENDA

- Introduction to Presenters & Panelists
- Fundraising 101, how to build a fundraising program
- Panel Discussion with practical advice on how to start your fundraising journey
 - School Leader perspective & Foundation perspective
- Q&A from the audience

INTRODUCTION



Ruth Dutton

Superintendent, The Academies Charter Management
Organization



Mallory Dwinal

Founder & CEO, Oxford Day Academy



Minnie Setty

Senior Program Officer, Chamberlin Family Foundation



Leigh S. Ariño de la Rubia

Director of Grants, CCSA
Fundraising Chair, Resolute Academy Charter School

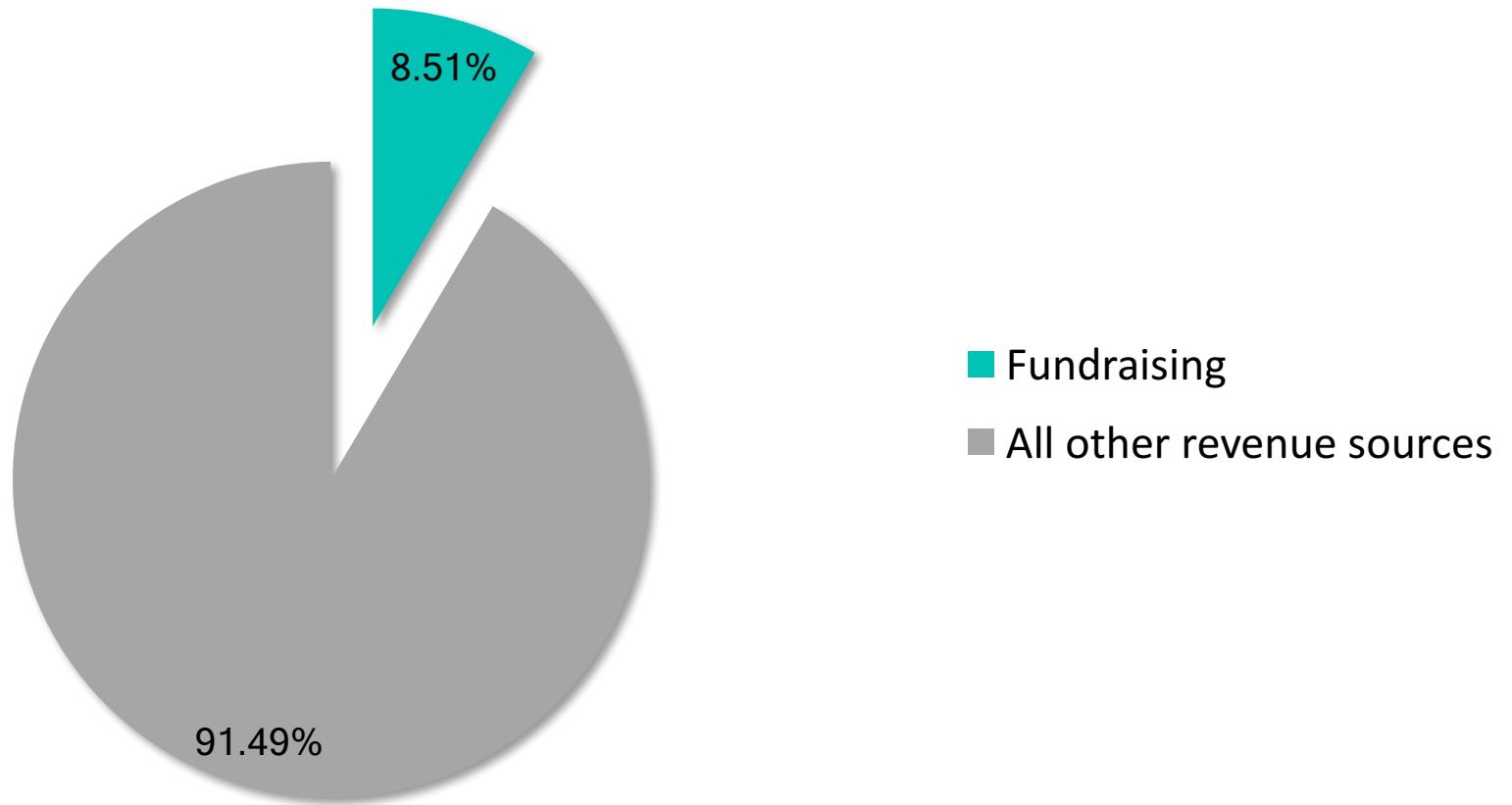


Helen Wang

Manager, School Development & Support, CCSA

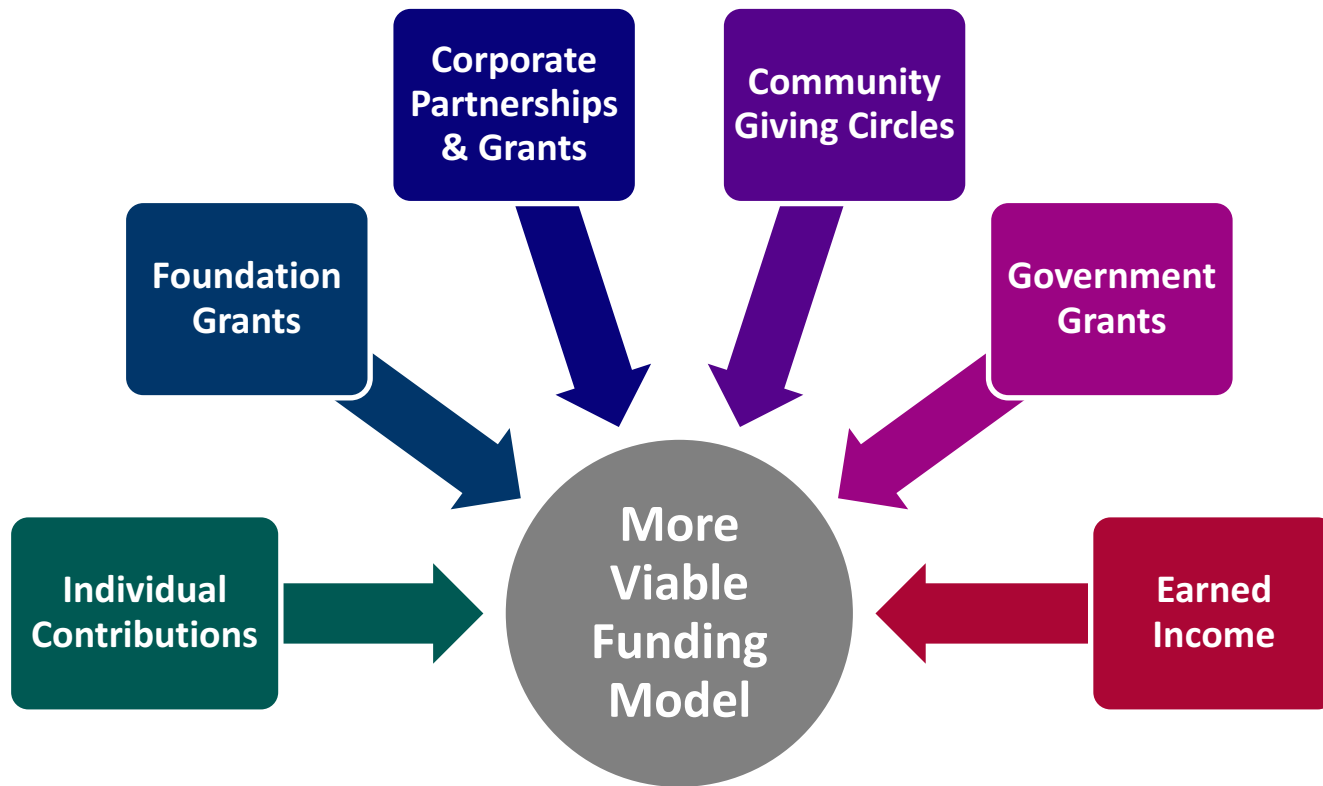


FUNDRAISING AS % OF CHARTER SCHOOL REVENUE



Source: [EdTec](#), 2013

THERE ARE A VARIETY OF FUNDRAISING OPTIONS





FUNDRAISING 101

- Important to develop ***your*** fundraising strategy
 - Based on strengths and community needs, may be straightforward
- Create a yearly fundraising plan with your board
 - Includes financial & strategic goals, cultivation & communications strategies, timeline & team assignments
 - Play to your school's & board's strengths
- Building a school's fundraising program takes time
 - Years 0&1: PCSGP, focus on cultivating individual contributions
 - Years 2&3: Replicate your programs, build towards foundation grants or deepening individuals' support
 - Years 5+ and for developed CMOs: Pursue major foundation grants for innovative work, pursue federal grants to expand/scale programs



Comprehensive Fundraising Resources

Strategic Fund Development: Building Profitable Relationships that Last by Simone Joyaux

- *Provides a comprehensive approach to planning ALL of your potential fundraising avenues (foundation/corporate grants, individual giving, community events) and how to build a relationship-based view of fundraising*

The Ask: How to Ask for Support for your Nonprofit Cause, Creative Project, or Business Venture by Laura Fredericks

- *Helpful for expanding your individual/major donor fundraising as well as how to get started with directly asking for money if you have no experience*

Asking Styles: Harness Your Personal Fundraising Power by Andrea Kihlstedt

- *Strengths-based fundraising advice that gives a suggested structure for fundraising meetings and determining a path that fits your personality*



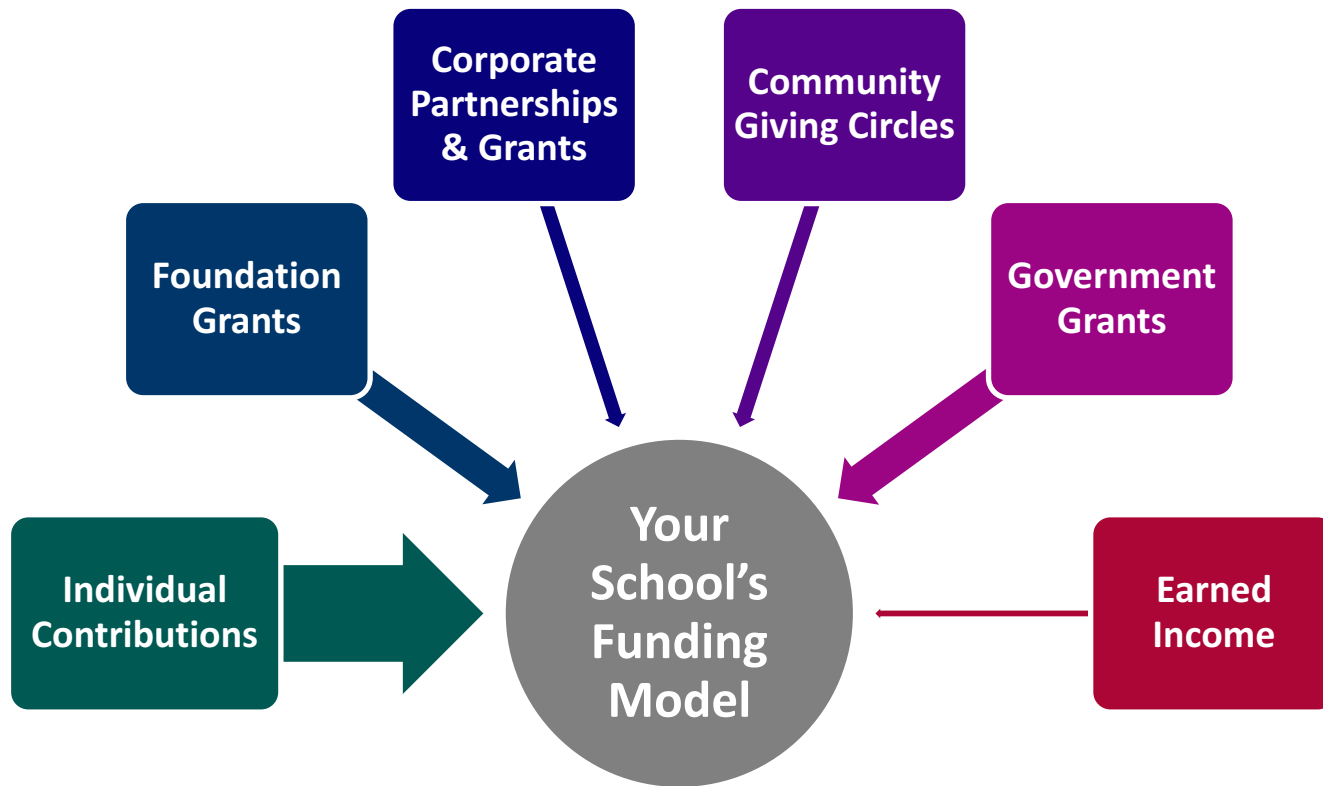
WHY SCHOOL DEVELOPERS FUNDRAISE

- Pre-approval expenses
- Start-up capital comes late
- Shortfall between program expenses and revenues
- Deferrals in state funding (e.g. cash flow gaps)

WHY ESTABLISHED CHARTERS FUNDRAISE

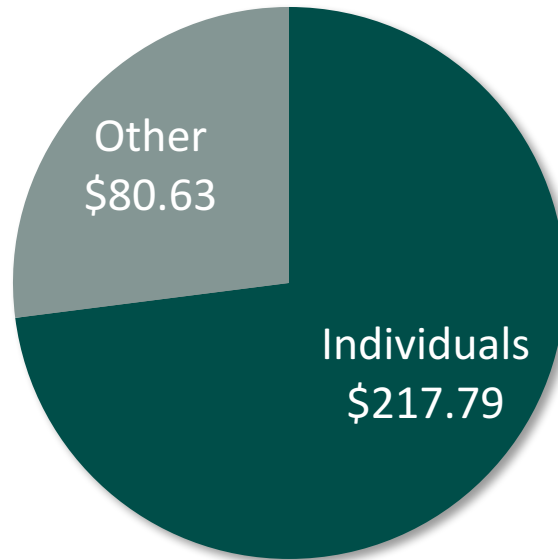
- Additional support for special needs students
- To develop or scale an innovative educational approach
- To replicate your school and/or successful programs
- Facilities, after-school, or curriculum needs
- Evening out funding gaps (e.g. deferrals, cash flow gaps)

FOCUS ON YOUR MOST LIKELY AVENUES



INDIVIDUALS GIVE A LOT AND CAN BE A NATURAL BASE

Total Giving to Charitable Organizations
(2011, in billions)





WHEN ARE INDIVIDUAL CONTRIBUTIONS A GOOD PRIMARY STRATEGY?

- Strong community connections, well-known in the region
- Well-connected charter school board that has some 'asking' experience
- Your school is located in a rural area (e.g. few private foundations are focusing on your region)
- Your parent base has capacity to give, and is willing to organize fundraising events in-person and online

WHEN ARE INDIVIDUAL CONTRIBUTIONS NOT THE BEST PRIMARY STRATEGY?

- Your school serves primarily high-need student groups
- Your school is located in an urban area and is a focus of many foundations or corporations' philanthropy
- You are new in your community and/or your board is new to 'asking'
- You haven't yet built capacity on your team to cultivate/engage donors
- Your school has a track record of developing innovative programs and scaling them/disseminating to other schools (e.g. you should pursue grants)

WHY PURSUE FOUNDATION GRANTS?

Facilities Upgrades

Establishing a Collaboration

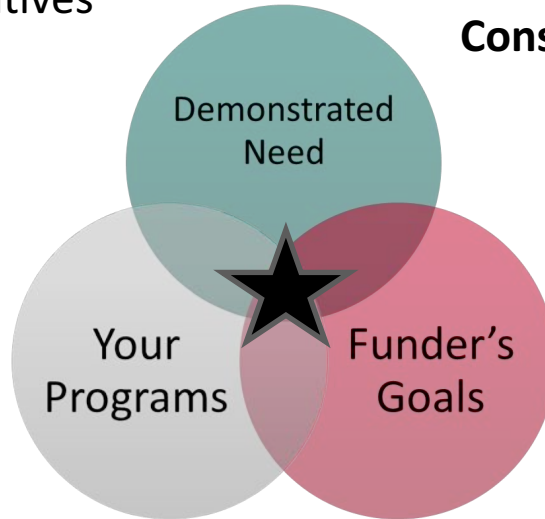
After-school programs

Policy Research

Family Involvement Initiatives

Starting a PLC or Consortium

New Position (outcomes tied to role)



Organizing a conference

Evaluation of Impact

Curriculum changes

To solve issues where you have a strong path forward, but need time and money

A Note on *Unsolicited Proposals*

- Foundations often list *‘We do not accept unsolicited proposals’* on their website
 - Take this at face value, and don’t send a completed proposal package
 - This DOES NOT mean the same as *“Do not contact us under any circumstances”*
 - Reach out via phone, via email, or by mail with a Letter of Inquiry; their website will likely mention what they prefer
- If a Foundation does not have a website or contact information, you will need to find a colleague to make an introduction for you



ABOUT CORPORATE GIVING

- Corporate Foundations may make financial contributions (matched & unmatched), provide in-kind services and products, or encourage their employees to volunteer time and resources
- Alignment with the company's mission and geographic focus is critical
 - For example, increasing community/public visibility of their brand, providing volunteer opportunities for their employees, building infrastructure/good will in the community, etc.
 - Can be great to ask for gift cards/in-kind donations for community events, or for supplies/technology for your school. Cash grants are often smaller and require a 'match' to apply.

ABOUT GIVING CIRCLES

- Structures vary tremendously, can be difficult to locate
 - Some are incorporated as non-profits or work with local community foundations
 - Others are informal groups of friends interested in increasing their collective social impact
 - Before pursuing, you must consider:
 - What is the group's focus?
 - What about will differentiate your school from other charities?
 - Are there other ways that they might support your program?

To learn more:

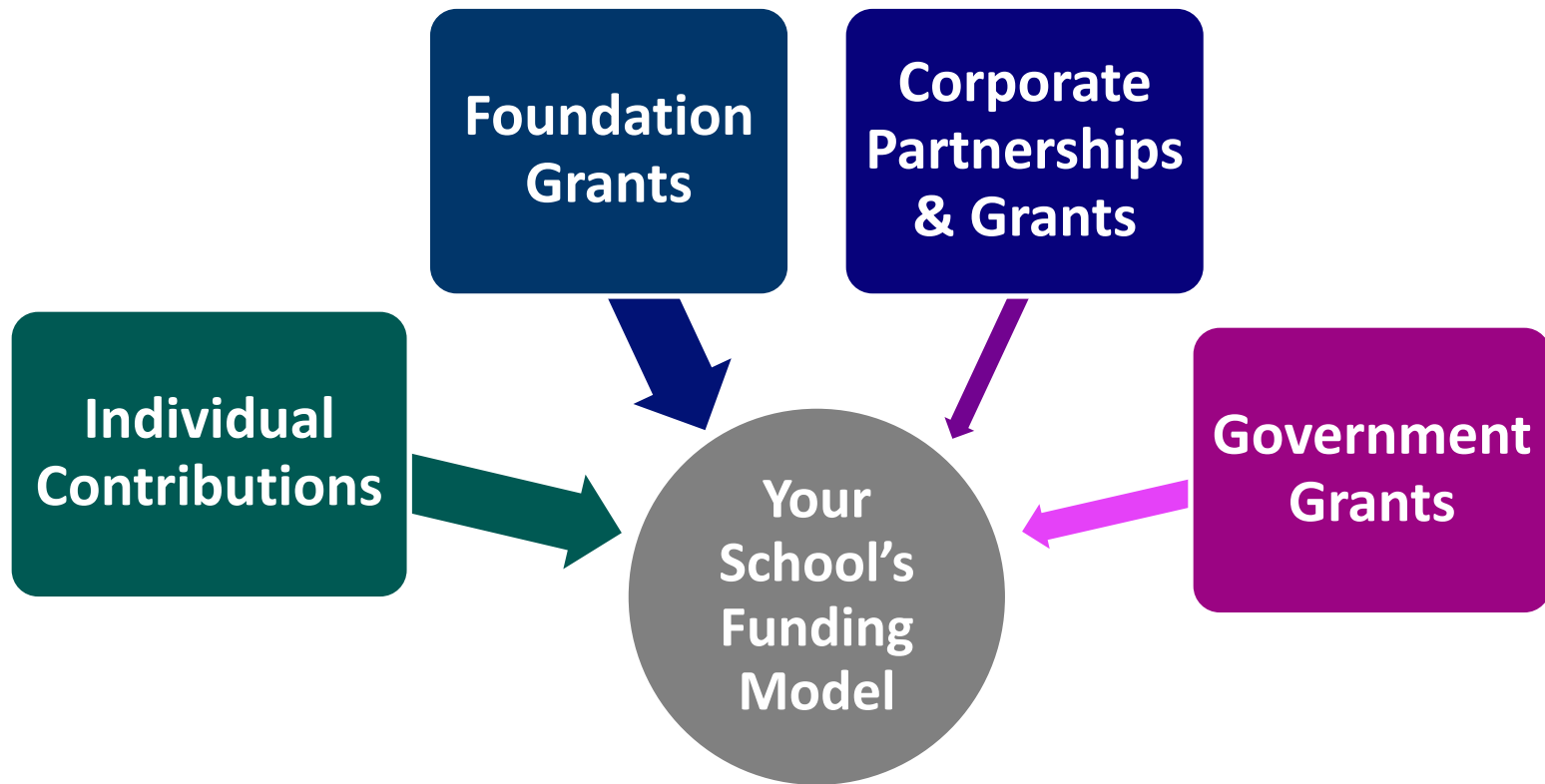
<https://www.givingforum.org/topic/giving-circles>



ABOUT GOVERNMENT GRANTS

- One-time and recurring grants may be available
 - Public Charter School Grant Program (PCSGP)
 - Charter Schools Program for CMOs (US Department of Education)
- Federal and state opportunities, one-time competitions and yearly cycles
- Government grants may require significant effort to apply and report; eligibility and compliance are key
- Applications are generally scored via rubric and compared to each other to determine awards, track record is often important
- Can require significant reporting and accounting infrastructure

WHAT WILL YOUR FUNDRAISING PLAN LOOK LIKE?





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Panel Discussion

- ❖ Successful fundraising pathways
- ❖ Tips for building the right relationships





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