

9-9:15am: Introductions

Provide brief introduction of staff members present. Their foundation, position and a little background info about themselves.

9:15-9:45am: Foundation Structure

Review of following:

1. Foundation Mission, Vision, Values/Areas of Focus. (Share or bring handouts such as Information on your Foundation, Annual Report, your programs, Focus areas, etc. What are your primary focus areas?)
2. Staffing Structure (including roles and responsibilities, how staffing is funded, partnership with school district and what they contribute)

9:45-10:30am: Donor Management

Share success and challenges. Things that would be great to include:

1. Discuss donor management tools and software along with best practices. If utilizing a donor management software, please bring your thoughts regarding the benefits and limitations.
2. Donor Communication. What are your forms of direct donor communication? (Ex. Newsletter, e-blasts, etc.)
3. Honoring large donors. What is your standard practice for recognizing and honoring your large donors?
4. Endowments- Temporary vs. Permanent

10:30-10:45am- Break, check emails etc.

10:45-11:30am: Tour of the Career Academy

Dale Heorauf, BPS Career Academy Principal, will provide a tour. It will review the opportunities afforded to our students that they would not necessarily have access to otherwise, along with the community collaboration efforts that are required to keep this innovative academy current with the industry standards.

11:30am-12:30pm: Lunch/Break

12:30-1:30pm Marketing and Foundation Awareness

Share successes and challenges. Things that would be great to include:

1. Traditional Marketing Strategies (ex. Newspaper, Radio, TV, newsletters, postcard appeals)- what works for you, what doesn't
2. Digital Marketing Strategies (ex. Website, Social Media, Online/Digital Ads)

1:30-2:15pm Fundraising Efforts (non-event)

Share successes and challenges, especially within the COVID era. Things that would be great to include:

1. Traditional and/or Ongoing Fundraising Focuses and Strategies
2. Digital and/or new Fundraising Focuses and Strategies

2:15-2:30pm: Break, check emails, etc.

2:30-3:30pm Special Events

Share successes and challenges, especially within the COVID era. Things that would be great to include:

1. Traditional and/or Ongoing Event Focuses and Strategies
2. Digital and/or new Event Focuses and Strategies- Did anyone hold a virtual event this year due to Covid?

3:30-4:30pm Other

This time has been allocated to discuss any/all additional items that foundation directors would like to review that may not be listed above. This portion of the day could/would optional for those traveling. This might include:

1. Board Member Participation
2. School District Admin relations
3. Financial Management Strategies
4. Grant Funding opportunities
5. Bylaws, Policies (Ex. Gift acceptance, Grant, Scholarship, etc.) and Procedures