



Board Agenda Item #	
Date:	August 13, 2020
To:	Magnolia Public Schools - Board of Directors
From:	Alfredo Rubalcava, CEO & Superintendent
Staff Lead:	Ismael Soto, Director of Develop and Communications
RE:	Development & Communications - 2020-21 Plan and Strategies

### **PROPOSED BOARD MOTION**

I move that the board approve the creation of the Development & Communications - Plan and Strategies for the 2020-21 academic school year.

### **INTRODUCTION**

In the Fall of 2019, the Outreach and Communications Department (OCD) began to build internal capacity to realize a more ambitious, internally driven fundraising and communications agenda that would supplement Magnolia’s public funding. Magnolia veteran Ismael Soto was named the first-ever Director of Development and Communications and the department was newly styled as the Development and Communications Department. Our next steps were to reduce our reliance on the outside contractor, Larson Communications, and bring on board a seasoned institutional giving consultant, JMP Grants Consulting, for strategic planning and grant writing support. The team developed proposal language, developed giving opportunities, conducted prospect research, created tracking documents for submissions and conversations with prospective funders, and structured a grants management portal to organize our work. As a young fundraising department, this was a necessary and critical step to position Magnolia for future development work and to be proactive, not reactive, in our approach.

#### [Young Fundraising Department](#)

The plan and strategies outlined in the Development & Communications - 2020-21 Plan and Strategies document set the stage for Magnolia Public Schools to lead successful fundraising campaigns and identify, cultivate, track, and solicit prospective government, and foundation sources for gifts to fund the organization’s priorities. It lays out a collaborative approach to

cultivate and build philanthropic relationships, align all internal and external communications, and develop messaging that furthers fundraising.

## BACKGROUND

### Assessment of External Environment

State funding for the 2020-21 academic year is uncertain. With the unknown trajectory of the coronavirus pandemic, we must redefine the nature of the classroom experience, prevent further learning loss, and help students and their families thrive to the best of our ability.

In an environment when nothing is “business as usual,” managing the development and communications - poses no less of a challenge. An April 2020 *Philanthropy News Digest* story captures the essence of concerns around fundraising: “One of the biggest questions facing the charitable sector in 2020 — especially for nonprofits not directly serving those affected by the coronavirus pandemic — is whether they can attract new donors and keep existing donors engaged.” Another concern is the looming economic crisis. To quote *The Nonprofit Times*, “Managers at a majority of endowments and foundations (55 percent) polled by Boston-based research firm NEPC, expect a severe recession similar to that of 2008.” ***Lower payouts by foundation endowments will translate into fewer and smaller grants.***

**The news is not all bad.** There have been positive developments that we can take advantage of if we have the right level of resources and a thoughtful, strategic approach to communications with the public and development with prospective funders.

**The opportunity is this.** To foreground the charter school movement and our solutions-oriented approach to root problems with decision-makers personally, directly, and strategically relentlessly.

1. There is an increased emphasis on *social justice* and eliminating disparities in health and education in low-income communities of color.
2. The rise of *trust-based funding relationships*, rather than traditional, transactional charitable giving.

### Assessment of Internal Environment

The view is generally positive that Magnolia *operates without the need for private philanthropic dollars* and has a healthy reserve without it. Yet, this climate works against establishing a culture of philanthropy, which would make the organization even stronger by hedging against cuts in public resources and increasing the number of friends and supporters.

The constituent base is extremely small. Cultivation and stewardship of this small donor pool will increase over time and with expansion. Developing strategies to initiate and strengthen relationships with both internal and external constituencies is critical to support a thriving culture of philanthropy at Magnolia.

## ANALYSIS

### Overall Strategy

Magnolia is unlike many other institutions of K-12 education that have mature fundraising programs and large numbers of engaged donors. These institutions utilize their boards to activate their philanthropic networks and host donor cultivation events to further engage constituents. Because the donor pool is so small due to the COVID-19 pandemic and the shift in funding priorities, the strategy is to quickly build the funder base from the 2019-20 academic year, move donors to annual grants, giving to campaigns, and the ultimate multi-year grant.

The plan is to identify prospective donors by using multidimensional fundraising marketing techniques. Additionally, it looks to **Acquiring New Donors**: social media campaigns, mailers, ads, email communication, and **Retention**: email campaigns, direct marketing, mailing promotional material, invitations to in-person virtual events, or school tours.

- **Strategy 1** - Cultivated Network
- **Strategy 2** - Pursue Funders
- **Strategy 3** - Annual Fund
- **Strategy 4** - Strengthen Development Infrastructure

### Funding Focus Areas for 2020-2021

Each year, Magnolia educates 3,900 TK-12 students whose backgrounds reflect Southern California's rich ethnic tapestry. During the 2018-19 academic school year, 71.2% of Magnolia's students were from low-income families, as determined by qualification for free or reduced-price lunch; among them were students who were homeless and those in the foster care system. An organization-wide average of 17.5% were English Language Learners (ELL). Our classes are further distinguished by the high number of Students with Disabilities (SWD) at 15.2%, relative to neighboring public schools, and 16.8% of our students require special education. Inclusive and welcoming classrooms are thus the norm at Magnolia Public Schools.

In collaboration with the Magnolia Academic department and office of the CEO & Superintendent, we have selected the following focus areas because we expect them to be institutional priorities in 2020-21 and they align well with funder interests. Throughout K-12 education in the state of California, the California School Dashboard is driving priorities (<https://www.caschooldashboard.org/>). These include the high priority need for Multi-Tiered Systems of Support (MTSS) that includes Academic Intervention, Behavioral Intervention, Social Emotional Learning (SEL), and Universal Design for Learning (UDL) that teaches the whole child.

All of the areas listed below will address systemic improvement and student engagement and success at Magnolia, and funders will be aligned to these priorities.

- **Focus Area #1:** Academic Enhancement
- **Focus Area #2:** Special Education
- **Focus Area #3:** Mental Health Support
- **Focus Area #4:** Professional Development
- **Focus Area #5:** Arts (Virtual and In-person)
- **Focus Area #6:** General Operating Support

#### [Fundraising Targets - 2020-2021 Fiscal Year \(FY\) Quarterly Giving Metrics](#)

We recognize the soundness of our current programs, a low-income population whose need is recognized, and focus on STEAM education. Magnolia will use these foundational components to diversify funding priorities and revise the current fundraising goals for the organization to meet the needs of our current and future student populations.

We have taken into account the current climate in philanthropy, factors out of our control, funder priority shifts around the COVID-19 pandemic, presidential election, social justice protest, unstable stock market, to determine our strategies and funding focus areas.

Please note, the estimates highlighted below are *conservative* in nature, our aim is to exceed the amounts. After considering all of the aforementioned factors, the **total fundraising target for Magnolia Public Schools is \$213,000 for FY20-21.**

#### **For 2020-2021 Sources of Revenue Include:**

1. Institutions
  - a. Foundations
2. Government Support and Grants
  - a. Local Government (City, State, and County)
3. Individuals
  - a. Board Members - Give or Get program
  - b. Alumni
  - c. Others including Staff, Friends, and Parents

## Allocation of Resources

### **Proposed Department Restructure**

Magnolia would be better positioned for success in 2020-21 with a reconfigured Development and Communications department.

Currently, Mr. Soto's role reports directly to the Chief Academic Officer and limits his direct access to key meetings and members of the organization, including the Magnolia board. The shift is aimed at giving Mr. Soto the leverage to drive initiatives forward to raise private dollars and coordinate an external relations effort. Mr. Soto under the new structure will report to and work directly with the Chief Executive Officer and Superintendent, be invited to and collaborate side by side with members of the C-Team during weekly meetings, and a direct line to the Board of Directors at Magnolia Public Schools, more specifically the governance committee.

Additionally, the new structure would shift supervision of the Communications and Charter Renewal Manager from the CEO to the Director of Development and Communications. Lastly, all contractors will be under the direct supervision of the Director of Development and Communications.

Additionally, the Development and Communications department will work with Career Development Centers at local Cal State Universities such as Los Angeles, Northridge, and Dominguez Hills to recruit a Development and Communications Intern.

## Calendar

The attached plan and strategies document includes a fundraising calendar July 1, 2020 through June 30, 2021 that are in addition to ongoing meetings and interactions with donors and prospective donors, as well as researching, preparing, and submitting foundation proposals and letters of intent.

The first quarter (Q1) of the United States federal government's fiscal year in July, August, and September, (Q2) are October, November, and December, (Q3) is January, February, and March, and (Q4) is April, May, and June. We anticipate going to the funder sources listed, but it is subject to change.

## Summary

Magnolia Public Schools is a tremendous resource for families in Southern California. As we devise innovative programs to meet our students' interests and challenges and share our accomplishments, we will attract more and more friends and supporters.

The reorganized Development and Communications department will maximize opportunities for exposure and cultivate new relationships as well as support the Magnolia Board and CEO & Superintendent as they initiate activities with these same ends. **The total amount of external financial investment will be just one measure of success:** other metrics will be:

- The number of contacts made with the philanthropic community
- The number of new donors acquired
- Leadership's activity levels
- Readiness of administrators and faculty to participate in the fundraising process

This plan is based on the best information available at this time, when much remains unknown about the coming year. The COVID-19 pandemic represents a challenge unlike any other in our history; therefore, we must remain open to revisiting assumptions and revising the plan. A living document, our roadmap will guide us through as we build stronger and stronger external relations.

## BUDGET IMPLICATIONS

Budget implications include:

- JMP Grants Consulting - The current agreement is written not to exceed \$20,000 for 2020-21 for Q1-Q4
- Association of Fundraising Professionals membership = \$380
- Other items include but are not limited to:
  - Digital marketing fees for the annual fund
  - MailChimp mass emailing platform fees
  - Professional development opportunities
  - Webinar fees
  - Conference fees (Virtual or in-person)

## EXHIBITS (attachments):

Attachments included:

1. 2020-21 Plan and Strategies



**Magnolia Public Schools**

Development and Communications Department

**2020-21 Plan and Strategies**

**Ismael Soto, Director of Development & Communications**

Revised July 6, 2020

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## Section I: Overview

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### Introduction

In the fall of 2002, Magnolia Public Schools (Magnolia) established its first charter school, Magnolia Science Academy-1, in the San Fernando Valley. Since then, Magnolia has established itself as a leader among K-12 educational institutions.

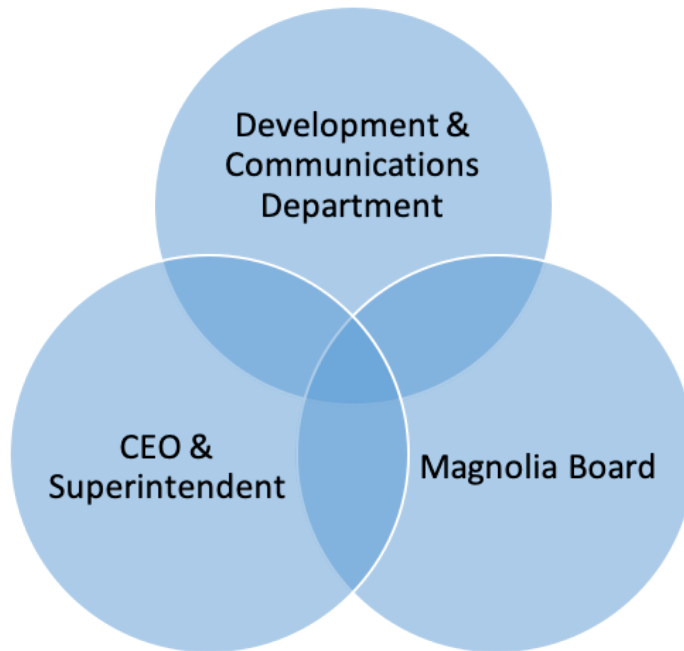
In the Fall of 2019, the Outreach and Communications Department began to build internal capacity to realize a more ambitious, internally driven fundraising and communications agenda that would supplement Magnolia’s public funding. Magnolia veteran Ismael Soto was named the first-ever Director of Development and Communications and the department was newly styled as the Development and Communications Department. Our next steps were to reduce our reliance on the outside contractor, Larson Communications, and bring on board a seasoned institutional giving consultant, JMP Grants Consulting, for strategic planning and grant writing support. The team developed proposal language, developed giving opportunities, conducted prospect research, created tracking documents for submissions and conversations with prospective funders, and structured a grants management portal to organize our work. As a young fundraising department, this was a necessary and critical step to position Magnolia for future development work and to be proactive, not reactive, in our approach.

### Young Fundraising Department

The plan and strategies outlined in this document set the stage for Magnolia Public Schools to lead successful fundraising campaigns and identify, cultivate, track, and solicit prospective government, and foundation sources for gifts to fund the organization’s priorities. It lays out a collaborative approach to cultivate and build philanthropic relationships, align all internal and external communications, and develop messaging that furthers fundraising.

**In a young fundraising department such as Magnolia Public Schools, there are some doors that are much more reliable than others to attract donors—and retain them.**

The Development and Communications Department envisions collaborative opportunities between units to raise awareness, enhance the Magnolia brand, and identify more prospective donors.



## Section II: Assessments and Historical Data

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### Assessment of External Environment

State funding for the 2020-21 academic year is uncertain. With the unknown trajectory of the coronavirus pandemic, we must redefine the nature of the classroom experience, prevent further learning loss, and help students and their families thrive to the best of our ability.

In an environment when nothing is “business as usual,” managing the development and communications - poses no less of a challenge. An April 2020 *Philanthropy News Digest* story captures the essence of concerns around fundraising: “One of the biggest questions facing the charitable sector in 2020 — especially for nonprofits not directly serving those affected by the coronavirus pandemic — is whether they can attract new donors and keep existing donors engaged.” Another concern is the looming economic crisis. To quote *The Nonprofit Times*, “Managers at a majority of endowments and foundations (55 percent) polled by Boston-based research firm NEPC, expect a severe recession similar to that of 2008.” **Lower payouts by foundation endowments will translate into fewer and smaller grants.**

A Competitive Advantage: At present, other charter schools have a significant advantage over Magnolia, as they have well-resourced fundraising and public relations engines:

## Comparable CMO Development & Communication Department Structures

Charter Management Organization	Private Grants & Contributions (2019)	Cost of Fundraising	No. of External Affairs Staff	Separate Fundraising Foundation
Alliance College-Ready	\$6.1M	\$1.07M	N/A	Y
Green Dot	\$2.2M	0*	N/A	N/A
KIPP:SoCal	\$12.7M	\$1.6M	13**	Y (nat'l)

\*Fundraising costs may be captured by another entity

\*\*5 positions dedicated to development - see Appendix A

**The news is not all bad.** There have been positive developments that we can take advantage of if we have the right level of resources and a thoughtful, strategic approach to communications with the public and development with prospective funders.

**The opportunity is this.** To foreground the charter school movement and our solutions-oriented approach to root problems with decision-makers personally, directly, and strategically relentlessly.

1. There is an increased emphasis on *social justice* and eliminating disparities in health and education in low-income communities of color.
2. The rise of *trust-based funding relationships*, rather than traditional, transactional charitable giving.

### Assessment of Internal Environment

The view is generally positive that Magnolia *operates without the need for private philanthropic dollars* and has a healthy reserve without it. Yet, this climate works against establishing a culture of philanthropy, which would make the organization even stronger by hedging against cuts in public resources and increasing the number of friends and supporters.

The constituent base is extremely small. Cultivation and stewardship of this small donor pool will increase over time and with expansion. Developing strategies to initiate and strengthen

relationships with both internal and external constituencies is critical to support a thriving culture of philanthropy at Magnolia.

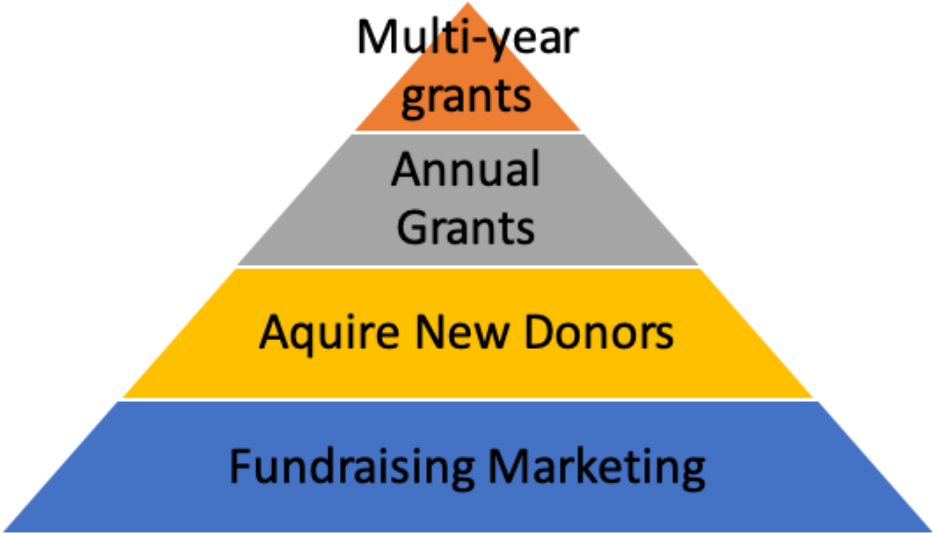
### Section III: Overall Strategy

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Magnolia is unlike many other institutions of K-12 education that have mature fundraising programs and large numbers of engaged donors. These institutions utilize their boards to activate their philanthropic networks and host donor cultivation events to further engage constituents. Because the donor pool is so small due to the COVID-19 pandemic and the shift in funding priorities, the strategy is to quickly build the funder base from the 2019-20 academic year, move donors to annual grants, giving to campaigns, and the ultimate multi-year grant.

One of the most important aspects of a successful advancement effort is a common understanding of the process as well as agreement on expected outcomes.

The plan is to identify prospective donors by using multidimensional fundraising marketing techniques. Additionally, it looks to **Acquiring New Donors**: social media campaigns, mailers, ads, email communication, and **Retention**: email campaigns, direct marketing, mailing promotional material, invitations to in-person virtual events, or school tours.



## Strategy 1 - Cultivated Network

Engagement should never be static. It is dynamic, fluid and ongoing.

### Funders/Expand Outreach to new funders and foundations

1. Follow-up emails and calls to foundations that have expressed interest in programs.
2. Event attendance - Such as the Association of Fundraising Professionals (AFP).
3. Get to know the Education Deputies for the County Supervisorial Districts in which Magnolia schools reside.
  - a. Sheila Kuehl is the Los Angeles Supervisor for the city of Reseda. Then request discretionary grants for projects/events.
4. In an upcoming Magnolia Minute Newsletter, do a short piece on Walton Family Foundation and other previous donors, and then send it to them to thank them again for their gifts.
5. Launch *The Rubalcava Report*, a quarterly CEO & Superintendent external report with an aim on the philanthropic community.
6. Targeted engagement with Magnolia staff and board leadership to cultivate and steward donors.
7. Steward events that keep funders engaged or show off Magnolia to new/ potential funders.



### Recommendations for the Magnolia CEO & Superintendent

Raising the CEO's profile in the local community would positively impact fundraising by increasing awareness of Magnolia's accomplishments and reputation. Two possible steps could be:

1. Board service or membership in organizations outside of charter schools:
  - a. Great Public Schools Now
  - b. LA Coalition for Excellent Public Schools (LACEPS)
    - i. Active board member 2018 to present
  - c. LA Latino Chamber of Commerce
  - d. City Club of Los Angeles

- e. Southern California College Access Network
  - f. California Collaborative for Educational Excellence Advisory Council member
2. Participation in (virtual or in-person) education forums and speaking engagements

### **Recommendations for the Magnolia Public Schools Board**

The Development and Communications Department will also rely on the MPS Board for guidance as it shapes and refines strategies and goals.

The Development and Communications Department proposes to brief the CEO and the MPS Board Vice-Chair/Chair of the Governance Committee quarterly on all development-related items including:

- Total dollars raised
- Renewed donors
- New donors
- Donor cultivation
- Grant Opportunities
- Philanthropy event opportunities
- Fundraising goal update

### Recommendations:

1. Board Vice-Chair creates a sub-committee dedicated to development within the Magnolia Public Schools - Governance Committee.
2. Have the Board Vice-Chair solicit the Governance Committee members and to have the Governance Committee members solicit the other MPS board members. All solicitations will be made in person (or virtually).
3. The Governance chair will lead the give or get a minimum contribution board campaign.
4. Initiate January 18, 2018, Board resolution *“Filling vacant MPS board seats”* to recruit new MPS board members with philanthropic connections utilizing the Board-approved recruitment tool. New Board members will tap into their philanthropic networks and help establish funder partnerships and financial resources for MPS. Utilize the *“Tips\_Vacant\_Board\_Seats\_Process”* document that was attached to the resolution to guide the recruitment process.
5. Activate the Board-approved December 17, 2017, resolution to launch the *Magnolia Advisory Committee, specific to Development*. The *Development Advisory Committee* will also share their expertise and experience in specific areas to key members of the MPS executive team and Board of Directors to make informed decisions for all MSA schools.

## Strategy 2 - Pursue Funders

1. Pursue funders whose priorities are aligned with Magnolia and its funding focus areas.
2. Write grants, making contact with program officers whenever feasible prior to submission for guidance.

## Strategy 3 - Annual Fund

1. We will initiate the first-ever Magnolia broad-based annual fund campaign. We will appeal to people who have been part of the Magnolia family for some time, drawing in alumni, current/former board members, vendors, contractors, and current and former faculty, administrators, and former families. We anticipate using a multidimensional strategy that will involve a social media appeal, personal outreach, *matching funds from committed supporters*, and perhaps even incentives to participate like giveaway items.

As we continue to engage alumni through the annual fund and other activities over the next few years, we expect to launch separate alumni giving campaign.

2. Create a “Support MPS” feature so people can give online via the MPS website/s.

## Strategy 4 - Strengthen Development Infrastructure

1. **Grants Management Portal:** Continue to develop the Grants Management Portal:
  - a. Boilerplate language for general MPS narrative, history, each program, etc.
  - b. Grant Agreements
  - c. Prospect Research
  - d. Philanthropy & Education Trends Research
  - e. Funder Reports
  - f. Grants: Local/National Foundations, Government (State/County/City), Corporations

## Funding Focus Areas for 2020-2021

Each year, Magnolia educates 3,900 TK-12 students whose backgrounds reflect Southern California’s rich ethnic tapestry. During the 2018-19 academic school year, 71.2% of Magnolia’s students were from low-income families, as determined by qualification for free or reduced-price lunch; among them were students who were homeless and those in the foster care system. An organization-wide average of 17.5% were English Language Learners (ELL). Our classes are further distinguished by the high number of Students with Disabilities (SWD) at

15.2%, relative to neighboring public schools, and 16.8% of our students require special education. Inclusive and welcoming classrooms are thus the norm at Magnolia Public Schools.

In collaboration with the Magnolia Academic department and office of the CEO & Superintendent, we have selected the following focus areas because we expect them to be institutional priorities in 2020-21 and they align well with funder interests. Throughout K-12 education in the state of California, the California School Dashboard is driving priorities (<https://www.caschooldashboard.org/>). These include the high priority need for Multi-Tiered Systems of Support (MTSS) that includes Academic Intervention, Behavioral Intervention, Social Emotional Learning (SEL), and Universal Design for Learning (UDL) that teaches the whole child.

All of the areas listed below will address systemic improvement and student engagement and success at Magnolia, and funders will be aligned to these priorities.

### **Focus Area #1: Academic Enhancement**

Our comprehensive educational experience emphasizes hands-on learning and foundational skills development, with supplementary tutoring, after-school programs, and school-to-university linkage. The curricular emphasis is on Science, Technology, Engineering, Art, and Math (STEAM) in a safe environment that cultivates respect for self and others. Our instructional model is upheld by the three pillars of “Excellence,” “Innovation,” and “Connection,” and our vision is to graduate students who are scientific thinkers that contribute to the global community as socially responsible and educated members of society.

Our academic reputation is evidenced by recent student outcomes and by local and national comparisons to other traditional and charter schools. **Fundraising in 2020-21 will focus on enriching the academic program and utilizing innovative approaches in STEAM education to deepen the academic experience for our students.**

Areas of Interest:

1. [Project Lead The Way](#) (PLTW): Virtual PLTW is a consideration
2. [STEAM LAB](#) Elective

### **Focus Area #2: Special Education**

Relative to neighboring public schools, Magnolia schools have a high percentage (15.2%) of students with disabilities. They are fully integrated into our classes. Our aim is to remove barriers to instruction and create mentally healthy, unified environments in which all students flourish.



Areas of Interest:

1. Multiple tiers of student support

### **Focus Area #3: Mental Health Support**

MPS seeks to build capacity to proactively address the mental health needs of our students. A veteran of the public education system, our CEO and Superintendent notes, “the troubling truth is that many of our graduates, including some of our highest-performing students, continue to grapple with personal crises.” Screenings and evaluations are identifying students with untreated trauma and emerging mental health conditions and connecting them to treatment and supports. Grant funding will support other programs as well for English Language Learners, Students with Disabilities (SWD), and students performing below grade level.

Areas of Interest:

1. Social-Emotional Learning

### **Focus Area #4: Professional Development**

We cannot make too great an investment in our teachers, school leaders, and home office staff, and parents who represent our most precious asset. Magnolia lacks sufficient funding to take training to the next level. We recognize the limitations of one-off instruction and would like to put the supports in place to deepen their learning.

Areas of Interest:

1. Universal Design for Learning (UDL) by [CAST](#)
2. [Leadership Success Cohort](#) (LSC): The goal of the LSC is to create an opportunity for school leaders to dive into the California Professional Standards for Education Leaders (CPSEL), understand the intricate skills required to lead as an effective school site administrator and learn with practice the skill sets designed to model mastery of the CPSEL as school leaders.

### **Focus Area #5: Arts (Virtual and In-person)**

During the 2016-2017 academic year, Magnolia Public Schools arts advisor Ismael Soto with support from the governing board of directors worked closely with an Arts Ed Collective coach, and the Community Arts Team consisting of Magnolia stakeholders to create the first-ever Magnolia Public Schools - *Strategic Arts Plan*. In 2017, during the annual STEM Expo, Magnolia announced that it was a STEAM organization and would subsequently change the name to the STEAM Expo in future years. The Strategic Arts plan was brought to a wider audience at MPS where initial steps were successfully implemented. However, Magnolia does not have adequate resources to equally service all ten Magnolia schools and drive the three goals by focus areas including:

- Infrastructure: Build support for the arts through leadership, collaborations, partnerships, and engagement.
- Content: Deliver Curriculum, Instruction, and Professional Development to support the arts and arts integration.
- Sustainability: Develop funding streams, organizational support, and long-term opportunities for teachers and students in the arts.

Areas of Interest:

1. SEL and Arts intervention
2. Arts integration (ex. Performing arts to enhance ELA)
3. Professional development opportunities for the Art Leads program members
4. Performing arts - teaching artist residency programs

### **Focus Area #6: General Operating Support**

Magnolia will seek general operating support as a strategy to increase the impact and support the Home Office has with the ten schools it operates by financially leveraging the existing budget.

## **Section IV: Revenue Center and Programs**

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### **Institutions**

#### **Foundations**

Part of the strategy to grow foundation giving is a close collaboration and sharing of resources with the Office of the CEO and Magnolia Board of Directors. The total number of grants in FY19-20 was over 10 totaling over \$682,000 in funding asks.

#### **Organizations**

We will increase resources by recruiting the CEO & Superintendent and Magnolia Board of Directors to build strategy, manage relationships, and build our prospect pool.

### **Individual Giving**

We aim to build relationships by means of giving campaigns among Magnolia board members, alumni, staff, and friends.

## Section V: Measuring Success

### FY19-20 Year to Date (YTD) to Percent of Goal - Snapshot

Grants include both donations and awards. Grant awards and payments that are due for program services already rendered are recorded as income (whether deferred or current) at the time they are promised or earned, even though the award has not yet been received.

### FY19-20 Year to Date (YTD) to Percent of Goal - Snapshot

SOURCE OF REVENUE	FY18-19 Actuals	FY18-19 Goal	FY18-19 % to Goal	FY19-20 YTD thru 6/30/20	FY19-20 Goal	FY19-20 YTD % of Goal
<b>INSTITUTIONS</b>						
Foundations	\$210,000			\$30,000	\$295,000	
Subcontracts from Organizations	\$103,650			\$5,000	\$5,000	
Corporations	\$5,000					
<b>Subtotal, Institutions</b>	<b>\$318,650</b>	<b>\$245,000</b>	<b>130%</b>	<b>\$35,000</b>	<b>\$300,000</b>	<b>12%</b>
<b>GOVERNMENT SUPPORT &amp; GRANTS</b>						
Local Government (City, State, County)	\$283,269			\$0		
<b>Subtotal, Government Grants</b>	<b>\$283,269</b>	<b>\$0</b>		<b>\$0</b>	<b>\$0</b>	<b>0%</b>
<b>TOTAL GIVING</b>	<b>\$601,919</b>	<b>\$245,000</b>		<b>\$35,000</b>	<b>\$300,000</b>	<b>12%</b>

### Fundraising Targets

#### 2020-2021 Fiscal Year (FY) Quarterly Giving Metrics

We recognize the soundness of our current programs, a low-income population whose need is recognized, and focus on STEAM education. Magnolia will use these foundational components to diversify funding priorities and revise the current fundraising goals for the organization to meet the needs of our current and future student populations.

We have taken into account the current climate in philanthropy, factors out of our control, funder priority shifts around the COVID-19 pandemic, presidential election, social justice

protest, unstable stock market, to determine our strategies and funding focus areas.

Please note, the estimates highlighted below are *conservative* in nature, our aim is to exceed the amounts. After considering all of the aforementioned factors, the **total fundraising target for Magnolia Public Schools is \$213,000 for FY20-21**. The chart below titled *FY20-21 Quarterly Giving Metrics* conveys the source of revenue breakdown by the institution, government support and grants, and individuals.

### FY20-21 Quarterly Giving Metrics

SOURCE OF REVENUE	FY20-21 Goal	Q1 YTD	Q2 YTD	Q3 YTD	Q4 YTD	FY20-21 YTD Percent of Goal
<b>INSTITUTIONS</b>						
Foundations	\$140,000					
Subcontracts from Organizations						
Corporations	\$5,000					
<b>Subtotal, Institutions</b>	<b>\$145,000</b>					
<b>GOVERNMENT SUPPORT &amp; GRANTS</b>						
Federal Funding						
Local Government (City, State, County)	\$50,000					
<b>Subtotal, Government Grants</b>	<b>\$50,000</b>					
<b>INDIVIDUALS</b>						
Board Members (\$500 each - Give or Get)	\$4,000					
Alumni	\$5,000					
Other (Faculty/Staff, Friends, Parents)	\$2,500					
<b>Subtotal, Individuals</b>	<b>\$11,500</b>					
<b>TOTAL GIVING</b>	<b>\$213,000</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

## Section VI: Allocation of Resources

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### Proposed Department Restructure

Magnolia would be better positioned for success in 2020-21 with a reconfigured Development and Communications department.

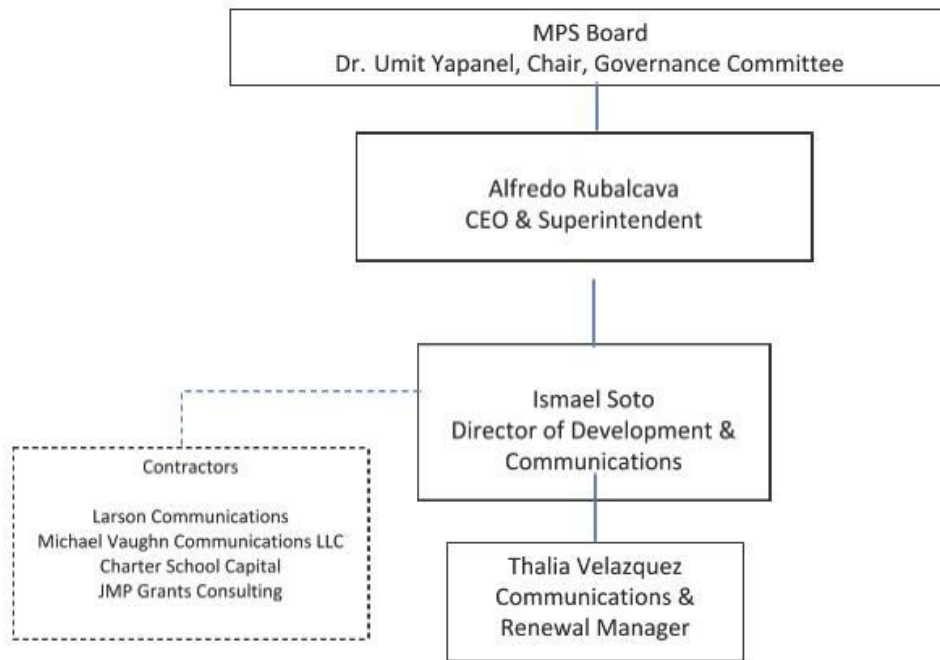
Currently, Mr. Soto's role reports directly to the Chief Academic Officer and limits his direct access to key meetings and members of the organization, including the Magnolia board. The shift is aimed at giving Mr. Soto the leverage to drive initiatives forward to raise private dollars and coordinate an external relations effort. Mr. Soto under the new structure will report to and work directly with the Chief Executive Officer and Superintendent, be invited to and collaborate side by side with members of the C-Team during weekly meetings, and a direct line to the Board of Directors at Magnolia Public Schools, more specifically the governance committee. Additionally, the new structure would shift supervision of the Communications and Charter Renewal Manager from the CEO to the Director of Development and Communications. Lastly, all contractors will be under the direct supervision of the Director of Development and Communications.

The Development and Communications department would be responsible for:

1. Development, which raises public and private philanthropic support;
2. Communications, which oversees all internal and external communications (social media, ParentSquare, media relations, and press advisories and releases);
3. Charter Renewal Applications; and
4. Enrollment Marketing support, which drives enrollment by means of deep digital and traditional marketing campaigns with new partner Charter School Capital. The Development and Communications department will be a support structure to provide guidance and act as a liaison between MSAs and Charter School Capital.

Additionally, the Development and Communications department will work with Career Development Centers at local Cal State Universities such as Los Angeles, Northridge, and Dominguez Hills to recruit a Development and Communications Intern who will focus on cultivating new relationships, research funding opportunities, and further establishes grant and donor relations.

## Team Structure - Development & Communications Dept. Organization Chart



## Section VII: Calendar (July 1, 2020 - June 30, 2021)

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These activities are in addition to ongoing meetings and interactions with donors and prospective donors, as well as researching, preparing, and submitting foundation proposals and letters of intent.

The first quarter (Q1) of the United States federal government's fiscal year in July, August, and September, (Q2) are October, November, and December, (Q3) is January, February, and March, and (Q4) is April, May, and June. We anticipate going to the funder sources listed below, but it is subject to change.

### QUARTER 1 - (July, August, September)

#### July 2020

1. Arts Ed Collective
  - a. Advancement Grant 2020 (Matching Grant)
  - b. Submit with a Teacher on Special Assignment (TOSA) arts focus

## August 2020

1. [Walton Family Foundation](#)
  - History:
    - i. Received: \$200K Start-Up grant in 2018-19 for MSA-1
    - ii. MPS qualifies to apply for a grant with WFF in 2020-21
2. [American Honda Foundation](#)
3. [Kinder Morgan](#)
  - Funding Priority: The company gives to education programs and has specific interests in the city of Carson.
  - Target awardee: Magnolia Science Academy-3 Carson
4. [Los Angeles Dodgers Foundation](#)

## September 2020

1. [Crail-Johnson Foundation](#)
  - Target awardee: Magnolia Science Academy-3 Carson, the foundation has a specific interest in the city of Carson
  - Timeframe: September 1-30 (Letter of Intent)
2. [N.D. - Union Bank Foundation](#)
  - i. Notes: Regional Philanthropy and Contributions Manager before submission

## QUARTER 2 (October, November, December)

### December 2020

1. ASES - Afterschool Grants
  - Re-apply for state-funded ASES grants in the fall of 2020, for 2021-22
  - Vendor: Think Together - Afterschool Expanded Learning Programs

### December 2020

1. [Joseph Drown Foundation](#)
  - Focus: General Support, diversity, equity, and inclusion, and COVID-19

## QUARTER 3 (January, February, March)

We will continue working through opportunities for the second half of the year.

### February 2020

1. [Ralph M. Parsons Foundation](#)
  - a. History:
    - i. LOI submitted December 18, 2019

- ii. Eligible to reapply with an LOI February 2021

## QUARTER 4 (April, May, June)

### April 2020

1. [The Ahmanson Foundation](#)
  - a. Eligible to reapply with an LOI April 16, 2021

## Section VIII: Summary

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Magnolia Public Schools is a tremendous resource for families in Southern California. As we devise innovative programs to meet our students' interests and challenges and share our accomplishments, we will attract more and more friends and supporters.

The reorganized Development and Communications department will maximize opportunities for exposure and cultivate new relationships as well as support the Magnolia Board and CEO & Superintendent as they initiate activities with these same ends. **The total amount of external financial investment will be just one measure of success:** other metrics will be:

- The number of contacts made with the philanthropic community
- The number of new donors acquired
- Leadership's activity levels
- Readiness of administrators and faculty to participate in the fundraising process

This plan is based on the best information available at this time, when much remains unknown about the coming year. The COVID-19 pandemic represents a challenge unlike any other in our history; therefore, we must remain open to revisiting assumptions and revising the plan. A living document, our roadmap will guide us through as we build stronger and stronger external relations.

## Section IX: Appendix

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Appendix A: KIPP:SoCal – Advancement Department Structure

***Total number of external department employees: 13***

### Chief External Impact Officer

Five direct reports:



1. Director of Development
2. Director of Marketing
3. Associate Director of Advocacy and Community Engagement
4. Communications Manager
5. External Impact Associate

### **Development Department**

- Director of Development
  - Associate Director/Leadership Giving Officer
  - Corporate and Foundation Relations Manager
  - Individual Giving Manager and Lead of Events
  - Development Associate

### **Marketing Department**

- Director of Marketing
  - Marketing Associate
  - Design Coordinator

### **Advocacy and Community Engagement Department**

- Associate Director of Advocacy and Community Engagement
  - Policy and Community Engagement Associate
  - ACE Associate- Family Engagement
  - ACE Associate- Civic Engagement