



Board Agenda Item #	IIIA Information Discussion Item
Date:	December 9, 2021
To:	Magnolia Public Schools - Development & Stakeholder Committee
From:	Alfredo Rubalcava, CEO & Superintendent
Staff Lead:	Ismael Soto, Senior Director of Development and Communications
RE:	Development Update for Quarters 1 and 2

## PROPOSED BOARD MOTION

This is an information item only, no action is required.

## BACKGROUND

### Giving Trends

A big question is whether giving will return to pre-pandemic levels. **Although there had been strong giving in the first quarter of 2021, growth slowed thereafter.** See [2021 Fundraising Slightly Ahead of 2020 Figures, Buoyed by New Donor Retention | Association of Fundraising Professionals \(afpglobal.org\)](#)

An annual survey on giving by **Give.org** revealed that **millennials would like to be approached more often for charitable gifts (far fewer baby boomers want to be tapped).** See [Are Donors Returning to Pre-Pandemic Giving Patterns? \(philanthropy.com\)](#)

A leader in education philanthropy, Chan Zuckerberg Initiative has just made major grants to expand the pipeline of diverse teachers, administrators, and education leaders nationwide. [CZI awards \\$9 million to advance racial equity in education pipeline | Philanthropy news | PND \(philanthropynewsdigest.org\).](#)

Another leader, **Walton Foundation, announced grants in November 2021 of \$20M for "career-connected learning."** [Walton Foundation invests \\$20 million in career-connected learning | Philanthropy news | PND \(philanthropynewsdigest.org\)](#)

Funders like Walton and CZI are talking about this moment of learning loss and pandemic disruption as an opportunity to transform education - with a focus on the hardest-hit kids. [Helping Kids Learn: Foundations Should Give More as Assets Grow \(Opinion\) \(philanthropy.com\)](#).

Also, recognizing this as a time of crisis, there have been changes in how local foundations operate. The Parsons Foundation Board, for instance, authorized a 10% increase in payouts for 2020 and likely for 2021. Some foundations remain in "crisis response mode" and have not reopened to unsolicited applications yet.

## INTRODUCTION

Below is a snapshot of the fiscal year (FY) quarterly giving metrics for quarters 1 and 2:

SOURCE OF REVENUE	FY21-22 Goal	Q1	Q2	Q3	Q4	YTD TOTAL GIVING
<b>INSTITUTIONS</b>						
Foundations	\$200,000	\$28,800	\$10,000			\$38,800
Organizations	\$5,000	\$30,800.00	\$14,000			\$44,800
Matching Gifts	\$2,000	\$200.00	\$2,000			\$2,200
Corporations	\$50,000	\$139,463.74				\$139,463.74
<b>GOVERNMENT SUPPORT &amp; GRANTS</b>						
Federal Funding	\$75,000					\$0
Local Government (City, State, County)	\$50,000	\$68,341				\$68,341
<b>INDIVIDUALS</b>						
Individuals	\$50,000					\$0
Board Members	\$6,000		\$2,000			\$2,000
Alumni	\$2,000					\$0
Annual Fundraiser Campaigns			\$22,733			\$22,733
Other (Faculty/Staff, Friends, Parents)	\$60,000	\$4,000				\$4,000
	<b>\$500,000</b>					<b>\$322,337.66</b>

**Variance:** We will add a variance column next to the YTD total giving prior to the next Development and Stakeholder Committee meeting.

**Alumni:** Would love input/feedback from the Development & Stakeholder Committee. **How much energy should we be giving this, they are the givers of the future (See "Giving Trends" below).**

### [Development Work Folder - Snapshot](#)

Below you will find the Development Work Folder which is the instrument used to capture the details of the three sources of revenue including institutions, government support and grants, and individuals. The details include areas such as purpose, term of the grant, grant report due dates, and contact information.

	A	B	C	D	E	F	G	H	I	J	K	L
	Institution (Fdn's, Corp, Orgs, and Matching Gifts)	Type	Grant Name	Purpose	Available Funding	Requested Amount	Date Requested	Date Received	Funding Awarded	Quarter / Date	Awardee	Term of Grant
1	Arts Ed Collective (LA Arts and Culture Dept.)	Foundation	Advancement Grant	TOSA, Art Leads, PD with Everyday Arts, Contra Tiempo, and Curriculum Development with Mindful Strategies		\$30,000.00	3/10/2021		\$28,800.00	Q1 - 7/1/2021	MERF	July 2021-June 2022
2												
3	Oltmans Construction	Corporation	Donation for MSA-1	Reopening efforts		\$15,000.00	8/1/2021	8/16/2021	\$5,000.00	Q1		
4	Universal Service Administrative Co.	Corporation	Schools and Libraries Program (E-rate) funding						\$119,463.74	Q1 - 7/1/2021		
5	Qualcomm	Matching Gift	Matching grant						\$200.00	Q1 - 7/12/2021		
6	Music Center	Organization	Music Center on Tour: Online	educational performing arts assemblies	\$660 cash value per performance		8/15/2021	8/31/2021	\$3,300.00	Q1	MSAs 1, 3, 6, 7, 8	
7	Dicks Sporting Goods	Corporation	Sports Matter Program		n/a	\$15,000.00		9/10/2021	\$15,000.00	Q1	MSA-Santa Ana	
8	CA MTSS School & Community Transformation Seed Grant	Organization	CA MTSS School & Community Transformation Seed Grant	To test out innovative models, or to better understand the efficacy of existing efforts that align with the CA MTSS framework and the CA School Climate and Conditions Work Group.	n/a	n/a	8/1/2021	9/9/2021	\$27,500.00	Q1		
9	Qualcomm	Organization	Matching grant	MSA-SD				9/30/2021	\$2,000.00	Q2		
10	California State Dominquez Hills	Organization	In-kind donation	Art classes provided by Cal-State Dominquez Hills-PRAXIS City Arts Parks program via a grant program they were awarded	n/a	n/a	10/18/2021	11/1/2021	\$14,000.00	Q2		
11	Pivot Learning	Foundation	Pivot Learning's EL Assignments project	EL Research across all MPS	n/a				\$10,000.00	Q2 - 11/12/2021		
12												
13												

### Proactive Planning with the Academic Team

We are working with the Academic Department to craft a Strategic Plan for 2022-23. The plan will provide a fundraising framework that is academically aligned with the department’s priorities now and into the future. The document will aim to recapture the MPS competitive edge.

Our RATIONALE is that *we want to be selective, and not jump on every grant opportunity that surfaces.*

### Recommendations for the Development and Stakeholder Committee

#### Giving Expectations from MPS Board Members 2021-22

If we want to attract wealthy supporters and continue to shift the **CULTURE OF GIVING at Magnolia**, our board is a smart place to start!

Although we launched the Magnolia Give of Get initiative in 2020-21, our MPS Board members are not already expected or required to give each year.

#### PERFORMANCE GOAL

1. Ensure that all Board members make personal restricted or unrestricted gifts - or secure their equivalent- by June 30, 2022
2. Ensure that each Board member introduces Magnolia to 3+ prospective donors/partners before June 30, 2022

## **OBJECTIVES**

- 1. GIVE OF GET - Achieve 100% giving among Board members**
  - a. Recommendation: Development and Stakeholder Committee to lead the Give or Get initiative with fellow MPS board members for a minimum Give or Get contribution of \$500 by June 30, 2021.
- 2. MOBILIZE board members to tap into their philanthropic networks**
  - a. Recommendation:
  - b. Development and Stakeholder Committee chair to:
    - i. Acknowledge donations and prospective donors and partner introductions during board meetings with Ismael Soto
    - ii. Funding asks during MPS Board meetings and other settings
    - iii. Provide direct support to board members - send any materials they need to solicit their contacts

## **Who are We Competing Against**

**KIPP:SOCAL** (*19 schools, 9500 students*):

- **Chief External Impact Officer**
- **Development Department:** **1)** Director of Development, **2)** Associate Director/Leadership Giving Officer, **3)** Corporate and Foundation Relations Manager, **4)** Individual Giving Manager, and **5)** Lead of Events, and Development Associate
- **Marketing Department:** Director of Marketing, Marketing Associate, and Design Coordinator
- **Advocacy and Community Engagement Department:** Associate Director of Advocacy and Community Engagement, Policy and Community Engagement Associate, ACE Associate- Family Engagement, and ACE Associate- Civic Engagement.

**Below is a chart that compares MERF and three of our CMO partners fundraising initiatives including Bright Star, Ednovate, and KIPP: SoCal:**

## Charter School Revenue Comparison for FY 2019

	2018 Revenue	2018 Government Grants	2018 Fundraising		Fundraising Expense (the cost to run that department)
			Fundraising Total	% of Total Revenue	
<b>MERF</b>	<b>47,041,355</b>	<b>46,435,214</b>	<b>606,141</b>	<b>1%</b>	<b>0</b>
Bright Star Schools	45,180,804	43,357,849	1,822,955	4%	113,811
Ednovate*	25,557,108	22,940,796	2,616,312	10%	26,800
KIPP SoCal	108,363,153	95,761,066	12,602,087	12%	1,598,391
*2020 990 is available for Ednovate. See below.					
	2019 Revenue	2019 Government Grants	2019 Fundraising		Fundraising Expense
				% of Total Revenue	
<b>Ednovate</b>	<b>30,929,052</b>	<b>26,989,369</b>	<b>3,939,683</b>	<b>13%</b>	<b>173,216</b>

## ANALYSIS

### Where to Invest in 2022-23: Staffing

If we want to attract wealthy supporters and continue to shift the CULTURE OF GIVING at Magnolia, our board is a smart place to start!

**Staffing:** Our MPS analysis shows positive movement in our philanthropic efforts since the beginning of July 2020 when the development work at MPS was prioritized. **\$300K of a \$500K annual fundraising goal while still in Q2.**

An investment next year 2022-23 with an additional staff member such as a Grants and Development Manager will support grant writing, fundraising, research, donor relations for all Magnolia Public Schools. Keeping us competitive in a saturated charter landscape.

**WHY INVEST:** Increased non-public funding will allow Magnolia to regain its COMPETITIVE EDGE.

## **BUDGET IMPLICATIONS**

No budget implications

## **EXHIBITS (attachments):**

Attachments included:

1. 12\_9\_21 Development & Stakeholder Development Update.pdf



# Development & Stakeholder Committee Update

*Quarters 1 and 2*

*By Ismael Soto - Senior Director of Development and Communications*

# TODAY'S AGENDA

- 1. Development YTD Updates**
  - Quarter 1 (July, Aug, Sept) & Quarter 2 (Oct, Nov, and Dec)
  - Development Work Folder Overview
- 2. Proactive Planning**
  - Academic Department Strategic Plan for 2022-23
- 3. Recommendations for the Development and Stakeholder Committee**
  - Giving expectations from MPS board members 2021-22
- 4. Where to Invest in 2022-23**
  - Who we are competing with
  - Where to invest in 2022-23



# DEVELOPMENT YEAR TO DATE (YTD)

- Q1 (*July, Aug, Sept*) & Q2 (*Oct, Nov, and Dec*)
- Development Work Folder

# Development YTD Update - Q1 & Q2

## Fiscal Year (FY) 2021-22 Quarterly Giving Metrics

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Other (Faculty/Staff, Friends, Parents)	\$60,000	\$4,000				\$4,000
	<b>\$500,000</b>					<b>\$299,604.74</b>



# PROACTIVE PLANNING

- Academic Department Strategic Plan for 2022-23

# Proactive Planning with the Academic Team

## Academic Department Strategic Plan for 2022-23:

1. **Provide the fundraising framework that is academically aligned with the department's priorities now and into the future.**
2. The document will aim to recapture the MPS competitive edge
3. **RATIONALE:** *We want to be selective, and not jump on every grant opportunity that surfaces.*

# **RECOMMENDATIONS**

## **for the Development and Stakeholder Committee**

- **Giving expectations from MPS board members 2021-22**
- **Performance goal and expectations**

# Giving Expectations from MPS Board Members 2021-22



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# Giving Expectations from MPS Board Members 2021-22

## PERFORMANCE GOAL

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# Giving Expectations from MPS Board Members 2021-22

## OBJECTIVES

1. **GIVE OF GET - Achieve 100% giving among Board members**
  - a. **Recommendation:** Development and Stakeholder Committee to lead the Give or Get initiative with fellow MPS board members for a minimum Give or Get contribution of \$500 by June 30, 2021.

# Giving Expectations from MPS Board Members 2021-22

## OBJECTIVES

2. **MOBILIZE board members to tap into their philanthropic networks**
  - a. **Recommendation:**
  - b. Development and Stakeholder Committee chair to:
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# **WHERE TO INVEST IN 2022-23:**

## **Investing in the future of MPS Advancement**

- **Who we are competing with**
- **Where to invest in 2022-23**

# Who We Are Competing With

## **KIPP:SOCAL** (*19 schools, 9500 students*):

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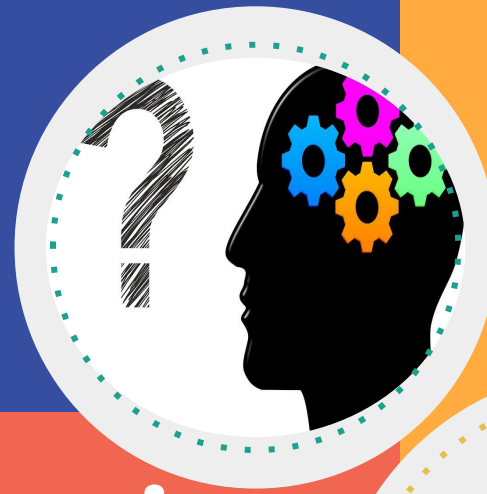
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**Thank You D & S Commitee**

**Q & A**