



Exploris™

ANNUAL FUND 2019-20

PLANNING PACKET

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KEY POINTS

Messages:

- We need to raise \$100,000 to balance our budget
- We don't receive state or local funds to pay for facilities
- This is not the Capital Campaign

Goals:

- \$100,000
- 100% participation: families, faculty/staff, Board of Directors

MARKETING/BRANDING

Should we name the campaign? Create a tag line?

- **Magellan:** "It's Up to Us" Campaign
- **Endeavor:** ECS Annual Fund
- **Central Park:** Sunshine Fund
- **Raleigh Charter High School:** Phoenix Fund
–I love their tag line: *Every family. Every year.*
- **Research Triangle High School:** Raptor Fund

Ideas:

- ☐ **Acorn Fund:** A nod to City of Oaks, to planting seeds/growth, etc.
- ☐ OR name Capital Campaign the "**Acorn Fund**" (help us grow!) and the Annual Fund the "**Oak Fund**" (keep us strong!)
- ☐ **Exploris Family Fund**
- ☐ **Empower Exploris Fund**
- ☐ **Annual Rocket Fund:** propel us forward!
- ☐ **Kaizen Fund** (links to school improvement team name)
- ☐ Possibly include wording such as "Education can be awesome"
- ☐ Need some hashtags for social media messaging
- ☐ For 2019-20, we will keep it as "**Exploris Annual Fund**"

TIMELINE

- ☐ Sept 30, every Monday in October, early November: send out small blurbs in teacher newsletters, Facebook group, and PTO Monday Minute
- ☐ Oct 24: Parent University
- ☐ October
 - Update website (Daniel)
 - Set up PayPal account (Koren)
 - Organize committee for personal outreach (Kimberly)
- ☐ October 28: Kick Off Letter: Email from Ellie
- ☐ Tuesday, Nov 5: Go live with Annual Day of Giving
 - Incentives when we meet certain levels of participation and/or certain amounts
 - Goal: 50% of funding by this date!
 - Frequent live updates to school website, Instagram, facebook, twitter (Kimberly?)
- ☐ November: Continue to push fundraising
 - Goal: 80% of funding by Dec 1, 80% participation
- ☐ January: Send out thank you letters if not already complete; strategy session based on current status of fund
- ☐ February: Interim push
- ☐ May: Final push (hopefully already complete by this point!)
- ☐ June: Reflect and capture best practices, alter plan for 2020-21, set timeline

MARKETING BLURBS

Blurb for September 30 Monday minute, grade newsletters, and parent Facebook page:

2019-20 ANNUAL FUND

Unlike traditional public schools, public charter schools do not receive **any** state funds to pay for facilities. The Exploris School spends over \$360,000 a year on facilities fees to cover our rent, land lease, and modular lease. We need the support of contributions from our Exploris families to help cover the facilities costs so that budget resources can be used to support instruction in the classroom. This annual contribution from our families will support the annual operating budget. Our campaign will kick off on November 5th.

Fundraising for our annual operating budget does not go toward the construction of a new building. The **Capital Campaign** fund has started to raise money to support the development of a new K-8 school. Capital Campaign funds are reserved in a separate Exploris School Foundation account to be used for future construction.

More info on how and when you can give will be available soon.

Blurb for October 14 Monday minute, grade newsletters, and parent Facebook page:

The **Annual Fund** is coming! We need to raise \$100,000 for our 2019-20 budget. This works out to \$220 per student per year. We know that is unrealistic for some families, so rely on families who are able to give generously.

Remember, we don't receive any rent money from the state or county! Raising funds is how we balance our budget, after we have done everything else we can to cut costs.

More info on how and when you can give will be available soon.

Blurb for October 21 Monday minute, grade newsletters, and parent Facebook page:

To kick off the **Annual Fund**, we will be hosting an annual Day of Giving on Tuesday, November 5. We hope everyone in the Exploris community will donate on this day. You can send in a check to The Exploris School (memo: Annual Fund). We will also provide an easy link for online donations or to set up monthly donations.

Join us this Thursday, October 24, at 6:30 pm at the elementary campus for a Parent University. We will discuss The Exploris School budget, charter school financing, and the status of our new building project.

Thank you for helping us pay our rent!

Blurb for October 28 Monday minute, grade newsletters, and parent Facebook page:

Does your child have grandparents who would be willing to contribute to the Annual Fund? We would love to contact them! (We will send one invitation and one reminder.) Fill out this form: <https://forms.gle/GCYG172XtVvEwX4U9>

Questions? Email Kimberly Harris at annualfund@exploris.org.

Thank you for helping to support Exploris!

Blurb for November 4 Monday minute, grade newsletters, and parent Facebook page:

Are you ready to give? The Annual Fund Day of Giving is tomorrow! Our goal is to raise \$100,000 in 24 hours. You can send a check in to the school with your child (memo line: Annual Fund) or donate online here: . *[[More verbiage to come with links, incentives, etc.]]*

Questions? Email Kimberly Harris at annualfund@exploris.org.

Thank you for helping to support Exploris!

Blurb for November 11 Monday minute, grade newsletters, and parent Facebook page:

[[Verbiage TBD depending on Day of Giving results.]]

Thank you for helping to support Exploris!

KICK OFF LETTER

EXPLORIS ANNUAL FUND

Hello! We are so glad you are part of the Exploris family. Now that the new school year is underway, we are launching our Annual Fund. This drive helps cover the cost of running our school. We rely on each of you to make it successful!

Just the facts (TL;DR): We need to raise \$100,000. We are asking every family to donate as generously as possible.

What can you do right now? Decide how much you are able to contribute, and plan to make this contribution via check or online on our Annual Day of Giving on Tuesday, November 5. *[[this wording for kick off letter]]*

You can make a **one time** or **monthly** donation here: xxxxx or send a check in to The Exploris School (memo: Annual Fund). *[[this wording posted to website on and after November 5]]*

There are 3 main fundraising drives at Exploris:

Annual Fund

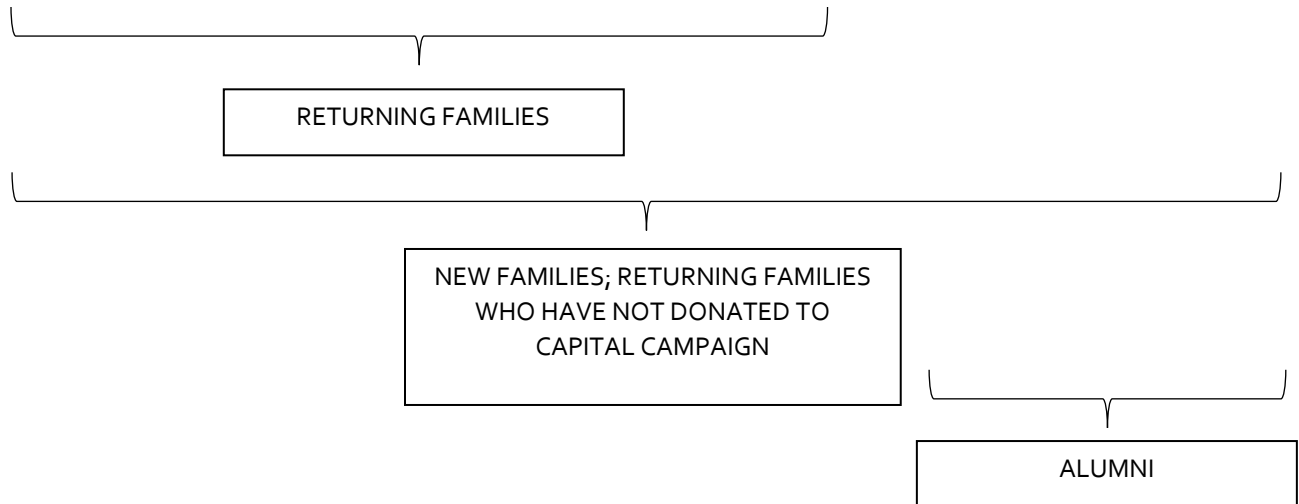
to cover a gap in operating costs

PTO fundraising

to cover school support endeavors run by the Parent Teacher Organization

Capital Campaign

to cover future building rent/lease



New families will be asked to donate to the Capital Campaign AND the Annual Fund. This year, returning families who have already donated to the Capital Campaign (thank you!!) will only be asked to donate to the Annual Fund. Alumni are always invited to donate to the Capital Campaign. All families have an opportunity to donate to or participate in PTO fundraisers.

Why do we need to raise money?

Charter schools do not receive the same funding that traditional public schools receive. In fact, in North Carolina, charter schools do not receive ANY money to cover building costs, because charter schools are not able to access the local bonds that WCPSS uses to pay for their facilities. As a result, Exploris must cover the cost of our buildings through our instructional funds. While this is true of all charter schools, our downtown location makes our rent even higher than a suburban location. At the same time, we believe our downtown locale offers invaluable and unique opportunities for student growth, service, and partnership with nearby organizations. Exploris spends around \$360,000 a year on facilities, which is almost 11% of our annual expenditures. In order to cover this cost, we innovate, we sacrifice, and we fundraise...*which is where you come in.*

How much do we need to raise?

We need to raise \$100,000 to support the 2019-20 operating budget. Want to see this year's budget? It's posted here: [xxxxxx](#)

But what about the Capital Campaign?

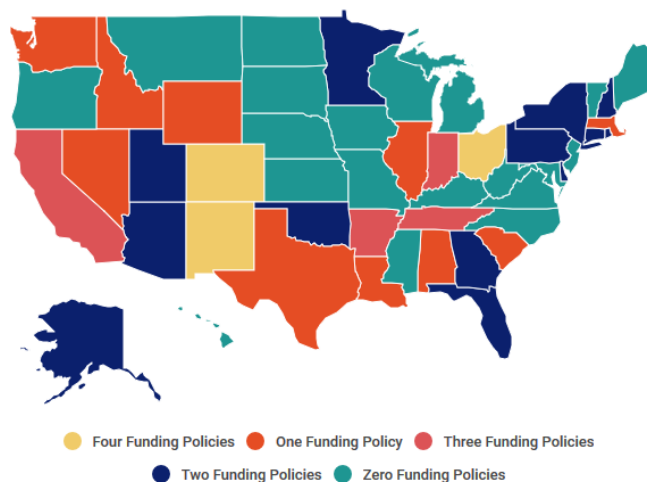
The Capital Campaign funds are in a completely separate account for our future building. We can't touch those funds to cover this year's operating costs. Want to donate to the Capital Campaign as well? You can do that here: [xxxxxx](#)

What about the silent auction we have in the spring? The Art by Me fundraiser?

Those specifically fund the Parent Teacher Organization (PTO), which supports the teachers, students, and families. You can see how they spend their funds here: <https://explorispto.org/about/budget/>

Are there other ways that charter schools are funded?

In North Carolina, it's harder than many other states (see image below comparing NC charter schools facilities funding to other states). We are always searching for and applying for grants to help offset costs.



Source: <http://blogs.edweek.org/edweek/campaign-k-12/2019/07/charter-school-facilities-state-funding-policies.html>

We are also actively pursue grant opportunities. For example, this year Exploris won a 5-year, \$600,000 grant. However, those funds can only be used to better meet the needs of traditionally underserved students—those who are economically disadvantaged, homeless or unaccompanied youth, non-native English speakers and students with disabilities. As such, they cannot be used to pay rent, etc.

How much money do you want from me?

As much as you are willing and able to give. We know that there are many charitable organizations at home and abroad that are doing amazing work, and that how you spend your money is a deeply personal choice. We would love it if you would make Exploris one of your top 3 charities! If everyone gave \$220/student, we would meet our goal. However, that's unrealistic for every family. We generally need donations to look like this:

- \$5000 (2 families) or \$500 per month for 10 months
- \$2000 (25 families) or \$200 per month
- \$1000 (25 families) or \$100 per month
- \$500 (25 families) or \$50 per month
- \$250 (25 families) or \$25 per month
- \$100 (40 families) or \$10 per month
- \$50 (10 families) or \$5 month
- \$20 (30 families) or \$2 per month

I simply can't afford to donate.

We understand that not everyone is in a financial position to donate, and that's okay. We want an economically diverse school! We strive for 100% participation, regardless of how much you give. The percentage of families that participate is a tangible demonstration of how invested our parents are in our school, and this data strengthens our position when we seek corporate involvement and apply for grants.

Is my donation tax deductible?

Absolutely, and you will receive written recognition of your gift that can be used for tax purposes. We also welcome donations from extended families, including grandparents. In fact, individuals over age 70 ½ who are required to take minimum distributions from retirement accounts can direct up to \$100,000 directly to a charity. The donation is not deductible, but also does not have to be recognized as income. (Anyone donating should consult with their tax professional for full details.)

Can I donate stocks instead of cash?

You can! Please contact Kimberly Harris at annualfund@exploris.org for details.

Can my company match my donation?

YES PLEASE. Many companies have corporate gift matching policies. They require the donor (you) to request a match, but this typically only takes 5 minutes. For example, SAS, Lenovo (up to \$250), and Verizon (up to \$5000!!) will match your donation 1:1, which essentially doubles your donation amount. Need help navigating corporate matching? Contact Kimberly Harris at annualfund@exploris.org.

Are you going to ask me for money every single year?

Yes, we are going to ask every family to contribute every year. That is the reality of charter schools.

Why support Exploris?

There are so many reasons! Here are a few:

Highlights of School Accolades

- US Department of Education Green Ribbon Award Winner
- Design for Change National Winner
- NC Model STEM School of Distinction – 1st school designated in the state
- *Honor School of Excellence* Recipient
- Exceeds state and national norms in both student achievement and annual growth for reading and math

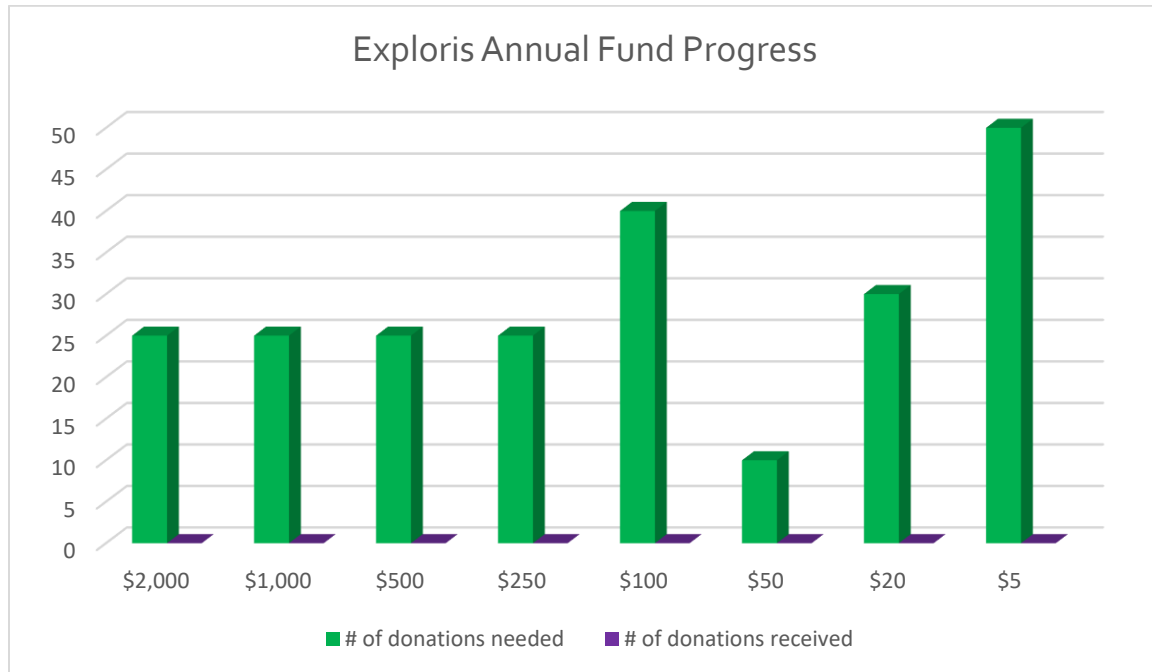
Teacher Accolades

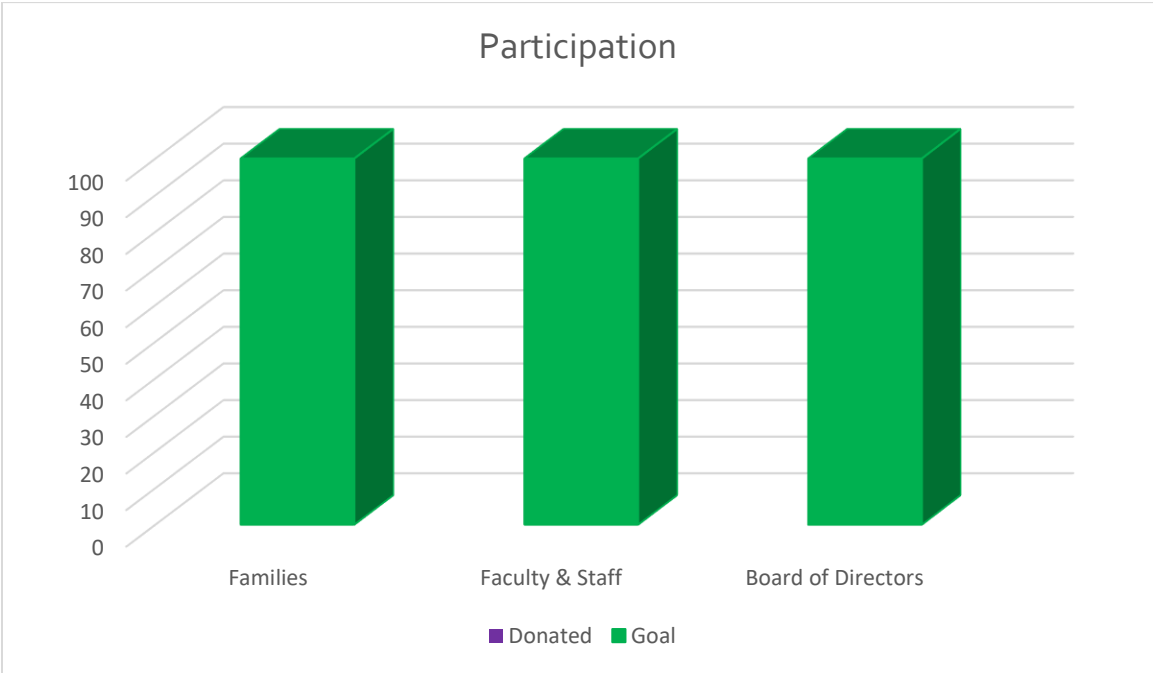
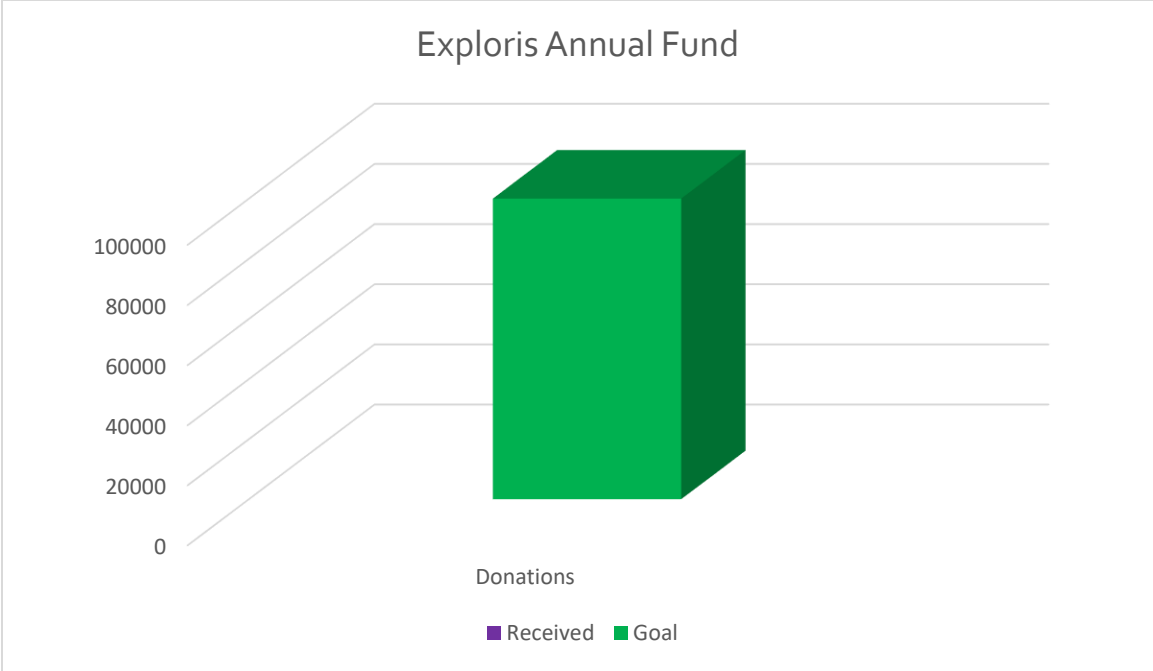
- Presidential Award for Excellence in Mathematics and Science Teaching
- Career Award for Science and Mathematics Teachers
- Kenan Fellows
- Nationally Board Certified Educators
- North Carolina Museum of Natural Science Educators of Excellence

END OF LETTER

PROGRESS TRACKING

Note: this section will be updated throughout the drive to track donations





Notes

- ☐ Parent Outreach Committee
 - Christine Hutchens
 - Rachel Cohen
 - Betsy Brown
- ☐ Faculty Outreach
 - Ellie
- ☐ Alumni Outreach Committee
 - Jacqueline Jenkins
 - Shannon Hardy (summer 2020)
- ☐ November 5: carpool signs, check collection, AM and PM carpool at both campuses

Best Practices (next year!)

- ☐ Over the summer, onboard Parent Outreach Committee. Have them start reaching out to parents on October 1.
- ☐ Give out magnets to those who donate?

To Do List

- ☐ Contact grandparents (Google form) and alumni (Jacqueline Jenkins)
- ☐ Set up PayPal for online donations (Koren)
- ☐ Update website (Daniel)
- ☐ Create 2-week trial on Double the Donation (set go live for Nov 4) (Kimberly)
- ☐ Consider video “ad”
- ☐ Make sure donors are thanked via letter (phone call for large donations); include tax info and amount (Kimberly; signed by Ellie)
- ☐ Track all donations (Kimberly)
 - Get entire school list, board of directors list, and faculty/staff list from Exploris
- ☐ Make a “competition” between grades/classes?
- ☐ Set up a committee of parents for personal outreach (Kimberly)
 - Email crew parents
- ☐ Can we provide (raffle) incentives/awards for those who give on Nov 5? Carpool privileges? Etc?
- ☐ Can we provide awards to the grade or class that first reaches 100% participation?