

Summary

1/19/00 meeting at Marilyn Hawkins office 11:30-1:00

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John Stanford International School at Latona Elementary  
Mission: To Educate and prepare all students to achieve today  
and tomorrow in a global community and economy.  
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recorder: Michele Anciaux

PRESENT:

Marilyn Hawkins, Karen Kodama, Willair St. Vil, Michele Anciaux,
Chris Nielsen (Happy Birthday to Chris!)
from the Alliance for Education:
Joel Groen, VP Development
Chris Park, Manager of Annual Giving and Events

The main purpose of the meeting was to look at approaches for the John Stanford International School to create a non-profit entity so that people can make tax-deductible donations to the school.

Joel and Chris from the Alliance for Education came to explain how the Alliance works with schools in this area.

Basically, the Alliance can provide umbrella 501c3 status by setting up a school account. In this case, the Alliance provides fiscal support at no charge (although interest earned on amounts up to \$25,000 held in the account does go to the Alliance to offset their costs). The money (principal, plus interest earned on sums over \$25,000) is controlled by the school, i.e. the principal or someone designated by the principal. (Some schools have set up an advisory committee, but that's not required.)

The money can be accessed at any time with a letter from the principal, and there is about a 5 day turnaround on checks disbursed.

Some advantages to this approach (from the Alliance brochure):

1. Long-term stability
(The Alliance will continue managing the funds, while volunteers in a school may come and go.)
2. Non-profit Status
(Gifts are tax-deductible.)
3. Efficient Gift Handling
(The Alliance tracks gifts and donors so that you can more easily provide acknowledgements, receipts, etc. as well as follow up on future donations.)
4. Flexibility of Giving

(The Alliance can also accept non-cash donations, such as stock, pledges (with follow-up reminders), bequest, etc.)

In addition, the Alliance staff is available to meet with the school group to help develop fundraising strategies and organize some aspects of events (such as auction forms).

Currently about 15 elementaries have established foundations through the Alliance. We looked at a brochure for the "Friends of Laurelhurst Elementary School Foundation," established through the Alliance. Their brochure targets donations in three areas:

- * Endowment Fund (goal of raising \$2,000,000!)
- * Principal Leadership Fund (to support teacher training)
- * Computer Initiative (upgrades and wiring)

This shows that there is some flexibility in targeting fundraising goals to attract different types of donors.

There is a pretty straightforward process for establishing an account with the Alliance.

In addition to the possibility of establishing the non-profit entity through the Alliance, the John Stanford Intl School could set up its own non-profit foundation. Marilyn thought this might appeal to one or more of the financial institutions in the city (where they would provide fiscal support - like the Alliance - gratis). In this case, the Foundation would have its own board of trustees to control the funds. (In contrast, the Alliance has one board of trustees to oversee all the school foundations, and the John Stanford Intl School would have no control over who those trustees are.)

Karen will be weighing the pluses and minuses of the two approaches so that we can make a final decision soon and begin more active fundraising efforts.

If you have a viewpoint you'd like to share, please Email Karen directly: KKODAMA@is.ssd.k12.wa.us.

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NOTE: As of January 14, I have resigned from my position as Parent Involvement Director for the Washington State PTA, although I'll continue doing some transition work for them over the next few weeks. Eventually, my Email [anciaux@wastatepta.org](mailto:anciaux@wastatepta.org) will go away. Please change your address books to: [Michele\\_Anciaux@msn.com](mailto:Michele_Anciaux@msn.com) (206) 522-0608  
Thanks!