

Minnesota Independent School Forum							
Grant Pipeline Report							
Fiscal year 2016-17							
thru June 30th, 2017							
				2016-2017	2016-2017		2016-2017
Deadline	Submitted	Source	Purpose	Request	Budget	Approved	YTD
Fall 2016	10/5/2016	3M Foundation	Unrestricted - General Ops	\$ 8,000.00	\$ 8,000.00	Approved	\$8,000.00
Fall 2016	10/5/2016	3M Foundation	Restricted - SLC	\$ 8,000.00	\$ 8,000.00	Approved	\$8,000.00
Fall 2016	10/5/2016	3M Foundation	Restricted - STEM Prog	\$ 155,000.00	\$ 155,000.00	Approved	\$155,000.00
Fall 2016	9/23/2016	General Mills Foundation	Unrestricted - General Ops	\$ 30,000.00	\$ 25,000.00	Approved	\$25,000.00
7/19/2016	7/19/2016	Otto Bremer Trust	Unrestricted - General Ops	\$ 25,000.00		Declined	\$0.00
Fall 2016	9/21/2016	Hardenbergh Foundation	Unrestricted - General Ops	\$ 25,000.00	\$ 25,000.00	Approved	\$25,000.00
January, 2017	1/30/2017	RBC Wealth Management	Unrestricted - General Ops	\$ 10,000.00	\$ 5,000.00	Approved	\$5,000.00
Spring 2016	3/30/2016	Rosemount Inc.	Unrestricted - General Ops	\$ 5,000.00	\$ 2,000.00	Approved	\$2,000.00
		Rosemount Inc.	Unrestricted - General Ops	\$ 5,000.00		Approved	\$2,000.00
Spring 2017	4/18/2017	Schott Foundation	Restricted - STEM Prog	\$ 35,000.00	\$ 30,000.00	Approved	\$35,000.00
February, 2017	2/16/2017	Xcel Energy Foundation	Restricted - STEM Prog	\$ 24,000.00	\$ 15,000.00	Approved	\$22,000.00
1/1/2017	2/14/2017	Richard Schulze Family Foundati	Unrestricted - General Ops	\$ 35,000.00	\$ 25,000.00	Approved	\$35,000.00
Fall 2016	11/1/2016	Katherine B. Andersen	Unrestricted - General Ops	\$ 50,000.00	\$ 20,000.00	Submitted	\$0.00
Spring 2017	3/28/2017	Pentair Foundation	Restricted - STEM Prog	\$ 25,000.00		Declined	\$0.00
Spring 2017		Nicholson Family Foundation	Unrestricted - General Ops				\$0.00
Fall 2016		WEM Foundation	Unrestricted - General Ops		\$ 25,000.00	Approved	\$25,000.00
Spring 2016	6/8/2016	Bush Foundation (Ecosystem)	Unrestricted - General Ops			Declined	\$0.00
			Total FY16-17	\$ 440,000.00	\$ 343,000.00		\$ 347,000.00

Minnesota Independent School Forum									
Development Report									
Fiscal year 2016-17									
Thru June 30th, 2017									
Grants		FY17 GOAL	FY17 YTD	FY16 YTD	DONORS	FY17 YTD	FY16 YTD		
	Member Services	\$ -	\$ 5,000.00						
	SCOPE			\$ 50,000.00	Individual				
	Unrestricted	\$ 135,000.00	\$ 112,000.00	\$ 125,000.00	\$10,000 +	2		3	
	SLC	\$ 8,000.00	\$ 18,000.00	\$ 8,000.00	\$5,000-9,999	1		1	
	STEM	\$ 200,000.00	\$ 212,000.00	\$ 208,000.00	\$2,500-4,999	2		3	
		\$ 343,000.00	\$ 347,000.00	\$ 391,000.00	\$1,000-2,499	12		8	
					\$500-999	6		7	
Honor Fund					\$1-499	24		24	
	Capacity			\$ -		47		46	
	Unrestricted	\$ 119,250.00	\$ 110,121.00	\$ 130,496.85					
		\$ 119,250.00	\$ 110,121.00	\$ 130,496.85	Corporation/Foundation				
					\$10,000 +	8		8	
Sponsorships					\$5,000-9,999	3		3	
	Awards	\$ 60,000.00	\$ 55,250.00	\$ 55,500.00	\$2,500-4,999	11		7	
	SLC	\$ 20,000.00	\$ 16,000.00	\$ 14,500.00	\$1,000-2,499	21		21	
	STEM	\$ 7,000.00	\$ 3,100.00	\$ 12,000.00	\$500-999	11		19	
	Seminars	\$ 3,000.00		\$ 2,250.00	\$1-499	21		13	
		\$ 90,000.00	\$ 74,350.00	\$ 84,250.00		75		71	
TOTAL		\$ 552,250.00	\$ 531,471.00	\$ 605,746.85	Board Giving				
					Total members	Donors		Total	
					20	18		\$24,496.97	
In-kind									
	Venue		\$ 2,700.00	\$ 1,628.90					
	Misc.			\$ 1,005.00					
			\$ 2,700.00	\$ 2,633.90					

Minnesota Independent School Forum							
Grant Pipeline Report							
Fiscal year 2017-18							
thru July 31st, 2017							
				2017-2018	2017-2018		2017-2018
Deadline	Submitted	Source	Purpose	Request	Budget	Approved	YTD
Fall 2017		3M Foundation	Unrestricted - General Ops	\$ 8,000.00	\$ 8,000.00		
Fall 2017		3M Foundation	Restricted - SLC	\$ 8,000.00	\$ 8,000.00		
Fall 2017		3M Foundation	Restricted - STEM Prog	\$ 150,000.00	\$ 155,000.00		
9/13/17		General Mills Foundation	Unrestricted - General Ops	\$ 30,000.00	\$ 25,000.00		
10/3/2017		Otto Bremer Trust	Unrestricted - General Ops				
Fall 2017		Hardenbergh Foundation	Unrestricted - General Ops	\$ 25,000.00	\$ 25,000.00		
January, 2018		RBC Wealth Management	Unrestricted - General Ops		\$ 5,000.00		
Spring 2018		Rosemount Inc.	Unrestricted - General Ops		\$ 2,000.00		
Spring 2018		Schott Foundation	Restricted - STEM Prog		\$ 35,000.00		
February, 2018		Xcel Energy Foundation	Restricted - STEM Prog		\$ 18,000.00		
1/1/2018		Richard Schulze Family Foundati	Unrestricted - General Ops		\$ 35,000.00		
Fall 2017		Katherine B. Andersen	Unrestricted - General Ops		\$ 20,000.00		
Fall 2017		WEM Foundation	Unrestricted - General Ops		\$ 25,000.00		
			Total FY17-18	\$ 221,000.00	\$ 361,000.00		

Minnesota Independent School Forum									
Development Report									
Fiscal year 2017-18									
Thru July 31st, 2017									
Grants		FY18 GOAL	FY18 YTD	FY17 YTD	DONORS	FY18 YTD	FY17 YTD		
	SCOPE	\$ -			Individual				
	Unrestricted	\$ 145,000.00			\$10,000 +				
	SLC	\$ 8,000.00			\$5,000-9,999				
	STEM	\$ 208,000.00			\$2,500-4,999				
		\$ 361,000.00	\$ -	\$ -	\$1,000-2,499				
					\$500-999				
Honor Fund					\$1-499	2	2		
						2	2		
	Unrestricted	\$ 116,500.00	\$ 200.00	\$ 700.00					
		\$ 116,500.00	\$ 200.00	\$ 700.00	Corporation/Foundation				
					\$10,000 +				
Sponsorships					\$5,000-9,999				
	Awards	\$ 55,000.00			\$2,500-4,999	1			
	SLC	\$ 16,000.00	\$ 5,500.00	\$ 1,500.00	\$1,000-2,499	2	1		
	STEM	\$ 7,000.00	\$ 1,250.00	\$ 2,600.00	\$500-999	2	4		
	Seminars	\$ 2,000.00			\$1-499	1	4		
		\$ 80,000.00	\$ 6,750.00	\$ 4,100.00		6	9		
TOTAL		\$ 557,500.00	\$ 6,950.00	\$ 4,800.00	Board Giving				
					Total members	Donors	Total		
					19	1	\$100.00		
In-kind									
	Venue								
	Misc.								
			\$ -	\$ -					

Development Report

September Executive Committee Meeting

Grants

- Meetings will be scheduled with Jackie Berry from the 3M Foundation, Jeff Peterson from the Hardenbergh Foundation and Paul Verret at Katherine B. Andersen. We will submit grant applications to these foundations in September. If you have any connections and are willing to reach out on MISF's behalf please let us know. We can provide a copy of the grant application.
- We have been assigned a new foundation officer at General Mills, Allison Olson. This is our fourth in four years. We received an invitation to apply for a grant for their fall grant cycle. Grant applications are due September 13th.
- In May we submitted an LOI to the Gertrude R. Shiely Charitable Trust. We received a letter back from Tina Jacobsen, Trustee for the Trust, with a copy of their application form and an invitation to submit a grant. Grant due date is November 11th.
- We have scheduled monthly calls with Foundation Search to assist in building a prospect list of new grant funders.

Honor Fund

- Annual Appeal letter will be mailed in September.
- The 2016-2017 Annual Report will be mailed out to past donors, President's Cabinet and Board members in mid-November. A PDF of the Annual Report will be emailed out to all member school leaders.

Sponsorships

- Raised \$6,250 in STEM Education Conference Sponsorships with a goal of \$7,000. Three colleges who participated as sponsors last year declined this year, but participated as breakout session presenters. Also, a \$1,500 sponsor from last year moved to the \$500 sponsorship level because of a decline in business but hopes to be back up again next year.
- We have reached our \$16,000 sponsorship goal for the School Leadership Conference. We are continuing to reach out to prospects with hopes to exceed that goal. We received \$10,000 from the Richard M. Schulze Family Foundation in the previous fiscal year which we have put towards this year's conference as well as \$8,000 from 3Mgives.

Board Giving

- Goal of 100% participation in Board giving by fiscal year end June 30, 2018
- Work with Board to continue making new corporate, individual and foundation connections.