



Development Report

March Executive Committee Meeting

Grants

- Submitted grants to Richard M. Schulze Family Foundation, RBC Wealth Management and Xcel Energy Foundation
- Conducted site visit with Schulze Foundation
- Conducted site visit with Xcel Energy Foundation at Totino-Grace. Thanks to Greg Chamberlain for participating and supporting our efforts.
- Received \$171,000 in grant funding from the 3M Foundation which will be reflected in February
- Received \$25,000 from the General Mills Foundation
- Plan to approach the St. Paul Foundation's Management Improvement Fund to ask for a grant to cover the remaining costs of SCOPE as well as an additional funding towards marketing the study
- Have submitted an LOI to Kern Family Foundation for our STEM program. They were identified through our new Foundation Search service. Additional prospects will be provided in the June board report

Honor Fund

- Honor fund is ahead of budget. A Spring Appeal letter will be mailed mid-March tying into the 40 year anniversary of MISF
- Setting meetings to connect with major donors to secure gifts before our fiscal year end

Sponsorships

- In partnership with the board of directors, our primary focus is securing our \$65,000 sponsorship goal for the Education Awards.
- Working on securing sponsors for the last 3 lunch seminars
- Will meet with our year-long sponsors/partners on 2016-17 partnership relationships.

Board Giving

- Goal of 100% participation in Board giving by fiscal year end June 30, 2016. Currently at 50%.
- Working with Board to continue making new corporate, individual and foundation connections

| | | | | | | | |
|---|------------------|------------------------------------|------------------------------|----------------------|----------------------|-----------------|----------------------|
| Minnesota Independent School Forum | | | | | | | |
| Grant Pipeline Report | | | | | | | |
| Fiscal year 2015-16 | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | 2015-2016 | 2015-2016 | | 2015-2016 |
| Deadline | Submitted | Source | Purpose | Request | Budget | Approved | YTD |
| | | | | | | | |
| Fall 2015 | 9/17/2015 | 3M Foundation | Unrestricted - General Opps | \$ 8,000.00 | \$ 8,000.00 | Approved | |
| Fall 2015 | 9/17/2015 | 3M Foundation | Restricted - SLC | \$ 8,000.00 | \$ 8,000.00 | Approved | |
| Fall 2015 | 9/17/2015 | 3M Foundation | Restricted - STEM Prog | \$ 125,000.00 | \$ 125,000.00 | Approved | |
| Fall 2015 | 9/17/2015 | 3M Foundation | Restricted - SLC | \$ 30,000.00 | \$ 30,000.00 | Approved | |
| 10/5/15 | 10/1/2015 | General Mills Foundation | Unrestricted - General Opps | \$ 35,000.00 | \$ 35,000.00 | Approved | \$25,000.00 |
| 2/5/2015 | 2/4/2015 | Otto Bremer Foundation | Unrestricted - General Opps | \$ 40,000.00 | \$ 25,000.00 | Declined | |
| Fall 2015 | 9/23/2015 | Hardenbergh Foundation | Unrestricted - General Opps | \$ 25,000.00 | \$ 20,000.00 | Approved | \$25,000.00 |
| 1/30/2016 | 1/25/2016 | RBC Wealth Management | Unrestricted - General Opps | \$ 6,000.00 | \$ 6,000.00 | | |
| Spring 2016 | | Rosemount Inc. | Unrestricted - General Opps | \$ 2,000.00 | \$ 2,000.00 | Approved | \$2,000.00 |
| Spring 2016 | | Schott Foundation | Restricted - STEM Prog | \$ 35,000.00 | \$ 30,000.00 | | |
| 1/31/2016 | 2/1/2016 | Xcel Energy Foundation | Restricted - STEM Prog | \$ 20,000.00 | \$ 15,000.00 | | |
| 1/1/2016 | 12/23/2015 | Richard Schulze Family Foundation | Unrestricted - Capacity Bldg | \$ 35,000.00 | \$ 25,000.00 | | |
| Fall 2015 | 6/10/2015 | Katherine B. Andersen | Unrestricted - General Opps | \$ 100,000.00 | | Approved | \$50,000.00 |
| Spring 2016 | | Nicholson Family Foundation | Unrestricted - General Opps | | \$ 5,000.00 | | |
| Fall 2015 | 11/17/2015 | Walter & Leona Schmitt Family Foun | Unrestricted - General Opps | | \$ 1,000.00 | | |
| | | WEM Foundation | Unrestricted - General Opps | | | | \$25,000.00 |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | Total FY15-16 | \$ 469,000.00 | \$ 335,000.00 | | \$ 127,000.00 |

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|---|--------------|----------------------|----------------------|----------------------|-------------------------------|-----------------|-----------------|--|--|
| Minnesota Independent School Forum | | | | | | | | | |
| Development Report | | | | | | | | | |
| Fiscal year 2015-16 | | | | | | | | | |
| Thru January 31, 2016 | | | | | | | | | |
| Grants | | FY16 GOAL | FY16 YTD | FY15 YTD | DONORS | FY16 YTD | FY15 YTD | | |
| | Capacity | \$ - | | \$ 30,000.00 | | | | | |
| | SCOPE | \$ 50,000.00 | \$ 50,000.00 | | Individual | | | | |
| | Unrestricted | \$ 142,000.00 | \$ 77,000.00 | \$ 48,000.00 | \$10,000 + | 1 | 1 | | |
| | SLC | \$ 8,000.00 | | | \$5,000-9,999 | 1 | | | |
| | STEM | \$ 201,500.00 | | \$ 45,500.00 | \$2,500-4,999 | 2 | 2 | | |
| | | \$ 401,500.00 | \$ 127,000.00 | \$ 123,500.00 | \$1,000-2,499 | 2 | 2 | | |
| | | | | | \$500-999 | 2 | 3 | | |
| Honor Fund | | | | | \$1-499 | 22 | 18 | | |
| | Capacity | | | \$ - | | 30 | 26 | | |
| | Unrestricted | \$ 135,000.00 | \$ 42,511.00 | \$ 33,080.00 | | | | | |
| | | \$ 135,000.00 | \$ 42,511.00 | \$ 33,080.00 | Corporation/Foundation | | | | |
| | | | | | \$10,000 + | 4 | 4 | | |
| Sponsorships | | | | | \$5,000-9,999 | | | | |
| | Awards | \$ 65,000.00 | | \$ 1,000.00 | \$2,500-4,999 | 4 | 5 | | |
| | SLC | \$ 20,000.00 | \$ 14,500.00 | \$ 18,500.00 | \$1,000-2,499 | 11 | 11 | | |
| | STEM | \$ 7,000.00 | \$ 7,500.00 | \$ 6,250.00 | \$500-999 | 15 | 11 | | |
| | Seminars | \$ 3,000.00 | \$ 1,750.00 | \$ 1,000.00 | \$1-499 | 6 | 3 | | |
| | | \$ 95,000.00 | \$ 23,750.00 | \$ 26,750.00 | | 40 | 34 | | |
| TOTAL | | \$ 631,500.00 | \$ 193,261.00 | \$ 183,330.00 | Board Giving | | | | |
| | | | | | Total members | Donors | Total | | |
| | | | | | 20 | 10 | \$13,425.00 | | |
| In-kind | | | | | | | | | |
| | Venue | | | | | | | | |
| | Misc. | | \$ 1,005.00 | \$ 11,128.00 | | | | | |
| | | | \$ 1,005.00 | \$ 11,128.00 | | | | | |