

Development Report
December 2018 Executive Committee Meeting

Grants

- We met with Jeff Peterson from the Hardenbergh Foundation, and submitted a grant application. We expect a response in December.
- A meeting is scheduled in December with Jackie Berry from the 3M Foundation to discuss prior year outcomes and future funding.
- Paul Verret from the Katherine B. Andersen Fund declined a meeting and indicated they would consider funding for next fiscal year. The most recent gift of \$50,000 was received in December 2017 and was intended to support general operations over the next two year period.
- Tim met with the WEM Foundation and learned that we do not fit their funding priorities at this time.
- On Aug. 14 a letter of inquiry was submitted to the St. Paul Foundation to submit a full proposal for a Management Improvement Grant. A follow-up letter was sent in October, awaiting response.
- A 6 month progress report was submitted to The Schulze Foundation in October as well as an LOI for funding in 2019/2020. We were invited to complete a grant application. The grant application for the spring 2019 Cycle was submitted on Nov. 30. We should hear back in May, 2019.
- Bremer Foundation – LOI was submitted on 11/16/18.
- Tim spoke with the Trust Officer from the Gertrude R. Shiely Charitable Trust and we will plan to submit an application on May 1, 2019.
- A grant prospect list has been created. Many of these grants require a LOI to be submitted prior to applying for a grant. See grant timeline for more details.

Honor Fund

- Annual appeal letter was mailed on Nov. 2, 2018.
- We received a \$30,000 gift from a generous donor – a 50% increase.
- Setting meetings to connect with major donors.
- The 2017-2018 Annual Report will be mailed the 2nd week in December 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

- We raised \$19,000 in sponsorship for the School Leadership Conference, exceeding our goal by \$2000.
- We have secured a year-long sponsorship with St. Mary's University. They will become a leadership sponsor for the 2019 School Leadership Conference, and the professional development sponsor for 2019-20.

Board Giving

- Goal of 100% participation in Board giving by fiscal year end June 30, 2019.
- Board Annual Appeal mailed out November 20th.

Minnesota Independent School Forum							
Development Report							
Fiscal year 2018-19							
Thru October 31, 2018							
Grants		FY19 GOAL	FY 19 YTD	FY18 YTD	DONORS	FY 19 YTD	FY18 YTD
	Unrestricted	\$110,000.00		\$0.00	\$10,000 +		
	SLC	\$0.00		\$0.00	\$5,000-9,999		
	STEM	\$207,500.00	\$15,000.00	\$0.00	\$2,500-4,999		
		\$317,500.00	\$15,000.00	\$0.00	\$1,000-2,499	1	1
					\$500-999		
Honor Fund					\$1-499	2	6
						3	7
	Unrestricted	\$126,823.00	\$6,750.00	\$3,601.77	Corporation/Foundation		
		\$126,823.00	\$6,750.00	\$3,601.77	\$10,000 +	1	
					\$5,000-9,999	1	
Sponsorships					\$2,500-4,999		
	Awards	\$55,000.00	\$0.00	\$0.00	\$1,000-2,499		1
	SLC	\$17,000.00	\$19,000.00	\$17,750.00	\$500-999		
	STEM	\$8,000.00	\$4,750.00	\$6,250.00	\$1-499		2
	Seminars/MS	\$1,500.00	\$1,000.00	\$500.00		2	3
		\$81,500.00	\$24,750.00	\$24,500.00	Sponsors		
					\$10,000 +		
TOTAL		\$525,823.00	\$46,500.00	\$28,101.77	\$5,000-9,999	1	
					\$2,500-4,999	2	4
					\$1,000-2,499	9	6
In-Kind					\$500-999	2	9
	Venue			\$2,482.00	\$1-499	4	4
	Misc.		\$2,450.00	\$750.00		18	23
					Board Giving FY 19		
		\$0.00	\$2,450.00	\$3,232.00	Total members	Donors	Total FY 19
					17	1	\$400.00
					Board Giving FY 18		
					Total members	Donors	Total FY 18
					18	17	\$10,043.10
					Board Giving FY 17		
					Total members	Donors	Total FY 17
					20	18	\$24,496.97

Minnesota Independent School Forum
Grant Pipeline Report
Fiscal Year 2018-2019

Source	Deadline	Purpose	2018-2019 Request	2018-2019 Budget	Approved	2018-2019 YTD	Reports Due	
Bush Foundation (Ecosystem)	Submitted - July 31	Unrestricted - General Ops		\$ -	Declined			
Old National Bank Foundation	Ongoing	Event Sponsorship	\$ 1,500.00	\$ -	Declined			
St. Paul Foundation	Submit LOI	Mgmt Improvement Fund					Submitted inquiry on 8-22-18, resubmitted on 11-12-18, awaiting response	
Ciresi Walburn Foundation for Children	Submitted LOI - May 18	General Operations			Declined		Declined, apply again in Spring 2019, positive discussion with program officer	
WEM Foundation	Fall 2018	Unrestricted - General Ops	\$ 25,000.00	\$ -			Not in giving priorities for this year, stay in contact	
General Mills Foundation	Fall 2018	Unrestricted - General Ops	\$ 30,000.00	\$ -			Not able to apply, working to make contact to further understand shift in giving guidelines	
Otto Bremer Trust	10/1/2018	Unrestricted - General Ops	\$ -	\$ -			Requested call with program officer to assess grant possibilities	
Hardenbergh Foundation	Fall 2018	Unrestricted - General Ops	\$ 25,000.00	\$ 25,000.00	Pending			
RBC Wealth Management	January, 2019	Unrestricted - General Ops	\$ 10,000.00	\$ 5,000.00				
Rosemount Inc./Emerson	March, 2019	Unrestricted - General Ops	\$ 5,000.00	\$ 2,000.00				
Schott Foundation	April, 2019	Restricted - STEM Prog	\$ 35,000.00	\$ 40,000.00		\$15,000.00	Extra grant received in August, regular grant due in spring	
Xcel Energy Foundation	February, 2019	Restricted - STEM Prog	\$ 25,000.00	\$ 22,000.00			Completed final report for 2018, 2019 report due June 2019.	
Richard Schulze Family Foundation	November, 2018	Unrestricted - General Ops	\$ 35,000.00	\$ 35,000.00	Pending		Grant submitted November 30, 2018	
Katherine B. Andersen	Schedule meeting in fall	Unrestricted - General Ops		\$ -	Double grant in previous year		Reconnect 2019-20, project or program specific funding	
3M Foundation	May, 2019	Restricted - STEM Prog	\$ 145,000.00	\$ 145,500.00	Mtg in Dec		Confirm new grant cycle	
The Gertrude R. Shiely Charitable Trust	May 1, 2019 & Nov. 22, 2019	Gen Op	Up to 10,000				Apply by May 1 for June trustees meeting	
Misc Grants - see prospect list	Throughout year			\$ 43,000.00				