**IRS Form 1023 Appendix**

**Part IV, Question 1**

*1. Describe completely and in detail your past, present, and planned activities. Do not refer to or repeat the purposes in your organizing document. For each past, present, or planned activity, include information that answers the following questions:*

*a. What is the activity?*

*b. Who conducts the activity?*

*c. Where is the activity conducted?*

*d. What percentage of your total time is allocated to the activity?*

*e. How is the activity funded (for example, donations, fees, etc.) and what percentage of your overall expenses is allocated to this activity?*

*f. How does the activity further your exempt purposes?*

Roosevelt High School Foundation (hereinafter, “RHSF”) wishes to provide a full, detailed, and complete response to Part IV, Question 1 as follows:

**VOLUNTER-DRIVEN**

The governing body of RHSF consists of22(twenty-two) Directors on its Board of Directors, including five (5) officers (President, Incoming President, Past President, Treasurer, and Secretary). The Board of Directors and officers are all ***uncompensated volunteers***.

RHSF has no employees.

RHSF compensates but a single independent contractor who is paid on an hourly basis for work performed. (The independent contractor’s written agreement can be found in the Appendix).

RHSF divides its activities into two broad areas: (1) school-based programming and (2) annual fundraising, events, and community outreach. The activities are simply listed here and fully described directly below.

“**School-based programming**” consists of the following activities:

1. Scholarships

2. Instructional and Extracurricular Grants

3. Principal’s Grant

4. Hall of Fame

“**Annual fundraising, events, and community outreach**” consists of the following activities:

1. Rider Cup Golf Tournament Fundraising Event

2. Community Gala

3. Rider Recall Newsletter and Blog

4. Reunion Tours

5. Year-End Connect Mailing

6. Roosevelt for Generations Capital Campaign

Each of the activities are fully described as follows:

**SCHOLARSHIPS**

a. What is the activity?

**Scholarships**

RHSF manages and awards nearly thirty thousand dollars ($30,000) in scholarships annually to graduating seniors. Additionally, RHSF maintains relationships with scholarship donors and solicits donations.

Scholarships are granted on an objective basis. Every student seeking a scholarship is provided the same application. A list of the criteria for the fourteen (14) types of scholarships can be found at <https://www.trhsfoundation.org/scholarships>. Every student is asked the same (or very similar) questions during an interview process.

b. Who conducts the activity?

RHSF manages the advertising and collection of scholarship applications. The applications are carefully and thoroughly reviewed based on alignment with the criteria selections, and ranked recommendations are made by either the Scholarship Committee, or the family funding the scholarship via RHSF. These recommendations are made to the Board of Directors for careful and thorough review and approval.

c. Where is the activity conducted?

RHSF maintains relationships with scholarship donors, who are alumni, teachers, or staff that reside in various locations, mostly in the general area of greater Des Moines. RHSF also solicits donations from individuals and families, who also mostly reside in the general area of greater Des Moines.

RHSF’s Board of Directors carefully and thoroughly reviews applicant information and approves the scholarships at its Board Meeting, which are generally hybrid on Zoom and in person at Roosevelt High School.

d. What percentage of your total time is allocated to the activity?

The percentage of RHSF’s total time allocated to scholarships is approximately fifteen percent (15%).

e. How is the activity funded (for example, donations, fees, etc.) and what percentage of your overall expenses is allocated to this activity?

The thirty thousand dollars ($30,000) in scholarships awarded annually are funded entirely by donations.

The expenses involved in raising funds for scholarships, maintaining scholarship programs, and for solicitation of donations are printing and mailing of materials to donors, and producing print and online marketing and final award materials for applicants. An additional expense is paying RHSF’s independent contractor to assist the Scholarship Committee and/or donors in processing and delivering all applications for review and approval.

The total expenses related to the scholarship program is $X.

The figure $X represents Y% of RHSF’s total expense.

f. How does the activity further your exempt purposes?

Providing scholarships supports students and allows students greater access to higher educational opportunities.

**GRANTS**

a. What is the activity?

**Grants**

Roosevelt High School teachers, staff, and extracurricular leaders have access to RHSF’s Instructional and Extracurricular Grants, which support student learning and experiences or professional development for teachers or staff.

b. Who conducts the activity?

The RHSF Executive Committee advertises the grants, processes grant applications, and presents the grant applications to the Board of Directors for careful and thorough review and approval. All grants are carefully and thoroughly reviewed by the Executive Committee and recommendations are made to the Board of Directors. The Board also carefully and thoroughly reviews the grants.

The process is completely objective. The same grant application is provided to everyone. The questions asked in any interview are the same for all applicants (or at the very least, substantially similar).

Upon completion of the activity, all grant recipients are required to provide the Board of Directors with a written summary and other supporting materials. This is shared with our community in Roosevelt High School monthly newsletters.

c. Where is the activity conducted?

The teacher, staff member, or extracurricular leaders receiving the grant facilitates the learning activity on Roosevelt High School campus or within our community.

RHSF’s Board of Directors carefully and thoroughly reviews the grants and approves the grants at a Board Meeting, which are generally hybrid on Zoom and in person at Roosevelt High School.

d. What percentage of your total time is allocated to the activity?

The percentage of RHSF’s total time allocated to grants is approximately ten percent (10%).

e. How is the activity funded (for example, donations, fees, etc.) and what percentage of your overall expenses is allocated to this activity?

Approximately twenty thousand dollars ($20,000) is annually budgeted to be awarded.

The expenses involved in awarding grants is minimal as a volunteer-led committee reviews the applications, presents them for Board approval, and records written summaries from the recipients.

*The total expenses related to the scholarship program is $X.*

*The figure $X represents Y% of RHSF’s total expense.*

f. How does the activity further your exempt purposes?

Providing grants to teachers, staff, and extracurricular leaders supports learning and positive experiences. Professional development for teachers and staff contribute to best practices and skill development in teaching and leading students.

**PRINCIPAL’S GRANT**

a. What is the activity?

**Principal’s Grant**

RHSF annually provides a five thousand dollar ($5,000) grant to the Roosevelt High School principal to supplement instructional and extracurricular expenses and programming. This grant is provided annually, with Board approval.

b. Who conducts the activity?

RHSF annually awards the grant, and the school principal determines programs and projects that need additional support on an as-needed basis throughout the school year. The grant is presented to the Board of Directors annually for the Board’s careful and thorough review and approval.

c. Where is the activity conducted?

RHSF’s Board of Directors approves the grant at a Board Meeting, which are generally hybrid on Zoom and in person at Roosevelt High School.

The principal conducts activities sponsored by this funding on campus, updating the board regularly, throughout the year, as the grant funding is dispersed.

d. What percentage of your total time is allocated to the activity?

The percentage of RHSF’s total time allocated to the principal’s grant is approximately one percent (1%).

e. How is the activity funded (for example, donations, fees, etc.) and what percentage of your overall expenses is allocated to this activity?

The five thousand dollars ($5,000) for the annual Principal’s Grant is provided by the RHSF’s General Fund.

The total expense related to the Principal’s Grant program is five thousand dollars ($5,000).

*The figure of five thousand dollars ($5,000) represents Y% of RHSF’s total expense.*

f. How does the activity further your exempt purposes?

Providing an annual grant to the principal of Roosevelt High School enables the principal to support educational and extracurricular endeavors at Roosevelt on an as-needed basis.

**HALL OF FAME**

a. What is the activity?

**Hall of Fame**

RHSF solicits applications and inducts alumni annually into the Roosevelt Hall of Fame. Nominations are submitted by the Roosevelt community and general public, and available at <https://www.trhsfoundation.org/halloffame>. Nominees must be graduates of Roosevelt High School, must have graduated at least ten (10) years prior to receiving the award, must be outstanding in their career field or community service work, and must have received other recognition for their contributions. RHSF hosts a full day’s activities at the school with the Hall of Fame inductees, and an evening reception with alumni. These events are scheduled in coordination with the award-winners, and usually occur in the spring semester.

b. Who conducts the activity?

RHSF manages the advertising and collection of Hall of Fame applications. The applications are carefully and thoroughly reviewed based on alignment with the objective criteria selection, and recommendations for award winners are made by the Hall of Fame Committee to the full Board of Directors for careful and thorough review and approval.

c. Where is the activity conducted?

RHSF solicits applications online and through relationships with alumni and the Des Moines community. RHSF hosts a full day’s activities at the school building with the Hall of Fame inductees, including classroom visits, a school-wide assembly, and a talk from the award-winners. RHSF hosts an evening reception with alumni as well.

d. What percentage of your total time is allocated to the activity?

The percentage of RHSF’s total time allocated to Hall of Fame is approximately five percent (5%).

e. How is the activity funded (for example, donations, fees, etc.) and what percentage of your overall expenses is allocated to this activity?

The Hall of Fame awards and reception are funded by the RHSF’s general expense fund.

The expenses involved include producing a plaque for the school, and printing and distributing both invitations for the reception and programs for the induction ceremony. An additional expense is paying RHSF’s independent contractor to market the nomination forms through RHSF’s website, update nomination materials, and coordinate the reception and ceremony planning.

*The total expenses related to the scholarship program is $X.*

*The figure $X represents Y% of RHSF’s total expense.*

f. How does the activity further your exempt purposes?

By honoring outstanding alumni, RHSF provides role models in various fields of endeavors for the student body, allows for the student body to meet and hear outstanding alumni who will provide inspiration and pride in Roosevelt High School, and maintains strong relationships with alumni and the Roosevelt community.

**RIDER CUP GOLF TOURNAMENT FUNDRAISING EVENT**

a. What is the activity?

**Rider Cup Golf Tournament Fundraising Event**

RHSF plans, publicizes, organizes, and hosts an annual golf tournament, the Rider Cup. This event takes place each May, with the exception of 2020 when it was postponed from May to August.

b. Who conducts the activity?

RHSF manages the advertising and collection of golfers’ entry fees. RHSF also solicits sponsorships from individuals and local businesses. The RHSF Events Committee leads the organization and planning, and the entire Board of Directors works to recruit golfers and sponsors for the event.

c. Where is the activity conducted?

RHSF hosts the event at Waveland Golf Course, a public course in the Roosevelt neighborhood in Des Moines. Solicitation of sponsorships also generally occurs from the RHSF Board of Directors to individuals and local businesses.

d. What percentage of your total time is allocated to the activity?

The Rider Cup Golf Tournament is currently RHSF’s biggest individual fundraising event. The percentage of RHSF’s total time allocated to the Rider Cup is approximately sixteen percent (16%).

e. How is the activity funded (for example, donations, fees, etc.) and what percentage of your overall expenses is allocated to this activity?

The Rider Cup Golf Tournament is funded through ticket sales, individual and business sponsorships, and donations for a raffle.

The expenses involved include producing print postcard invitations, online ticketing fees, online marketing, and Waveland Golf Course fees.An additional expense is paying RHSF’s independent contractor to assist the Events Committee in general event planning,

*The total expenses related to the scholarship program is $X.*

*The figure $X represents Y% of RHSF’s total expense.*

f. How does the activity further your exempt purposes?

Furthering RHSF’s exempt purposes requires resources. The Rider Cup Golf Tournament has historically been RHSF’s largest annual fundraiser.

**R PARTY: COMMUNITY GALA FUNDRAISING EVENT**

a. What is the activity?

**R Party Community Gala Fundraising Event**

RHSF plans and coordinates the R Party, a community gala including a dinner and silent auction, in collaboration with the Roosevelt High School staff, and the staff and parents at elementary and middle schools which feed into Roosevelt High School. This co-planning model was adopted in 2021; previous R Party events had been solely planned and organized by the RHSF.

The R Party supports RHSF, as well as Roosevelt High School’s Activities Funds and booster programs for athletics and arts, and the elementary and middle schools which feed into Roosevelt High School. The event’s funds are distributed to benefit RHSF’s general fund and all participating schools’ activities funds, to ensure equitable access for all current Roosevelt student and all future Roosevelt students.

b. Who conducts the activity?

RHSF plans and coordinates the R Party along with the Roosevelt High School principal and activities directors, and staff and parents at elementary and middle schools which feed into Roosevelt High School. RHSF and the Project Manager coordinate to provide invitations, maintain the event website, and organize online ticketing, and the RHSF recruits event sponsors and silent auction donations.

c. Where is the activity conducted?

The R Party is held at local event centers. The 2019 R Party was held at the River Room Event Center in Des Moines; the 2020 event was cancelled; the 2021 R Party will be hosted at Curate Event Center in Des Moines. Solicitation of donations, ticket sales, and silent auction items also generally occurs from the RHSF to individuals and families.

d. What percentage of your total time is allocated to the activity?

The percentage of RHSF’s total time allocated to the R Party is approximately sixteen percent (16%).

e. How is the activity funded (for example, donations, fees, etc.) and what percentage of your overall expenses is allocated to this activity?

The R Party is funded through ticket sales, individual and business sponsorships, and silent auction donations.

The expenses involved include producing print invitations, online ticketing fees, and online marketing. An additional expense is paying RHSF’s independent contractor to assist the Events Committee in general event planning.

*The total expenses related to the R Party Community Gala $X.*

*The figure $X represents Y% of RHSF’s total expense.*

f. How does the activity further your exempt purposes?

The R Party Community Gala helps raise funds directly to support RHSF ongoing work, while collaborating with school leaders for mutual benefit in fundraising and a wider reach in attendees. By working with Roosevelt High School’s principal, activities director, and local elementary and middle schools, the event’s scope can also benefit extracurricular and academic experiences for future Roosevelt students.

**RIDER RECALL NEWSLETTER AND BLOG**

a. What is the activity?

**Rider Recall Newsletter and Blog**

RHSF’s Board of Directors composes a monthly email newsletter, the Rider Recall, to celebrate Roosevelt students’ accomplishments, maintain active communication with alumni and donors, and to promote upcoming fundraising efforts and community events. Past articles can be viewed on RHSF’s blog at <https://www.trhsfoundation.org/blog>.

b. Who conducts the activity?

RHSF’s Marketing and Communications Committee drafts and edits the Rider Recall newsletter monthly. The Project Manager coordinates scheduling, formatting, and emailing the newsletter, and posting articles to the RHSF blog: <https://www.trhsfoundation.org/blog>

c. Where is the activity conducted?

RHSF’s Marketing and Communications Committee and Project Manager work remotely on the Rider Recall and Blog.

d. What percentage of your total time is allocated to the activity?

The percentage of RHSF’s total time allocated to the Rider Recall Newsletter and Blog is approximately ten percent (10%).

e. How is the activity funded (for example, donations, fees, etc.) and what percentage of your overall expenses is allocated to this activity?

RHSF pays its independent contractor to assist in writing and formatting, sending the newsletter, and maintaining the blog. Additional expenses include RHSF’s subscription to an online donor management and communications system (called “Bloomerang”) and website host (called “Wix”). Bloomerang costs $2,746 per year (this entirely covers database and e-newsletter) and Wix costs $487 every 3 years.

The total expenses related to the Rider Recall Newsletter and Blog is $X.

The figure $X represents Y% of RHSF’s total expense.

f. How does the activity further your exempt purposes?

Regular contact with alumni and donors helps to share news from Roosevelt and RHSF, promote upcoming events, and maintain relationships with the greater Roosevelt community.

**REUNION TOURS**

a. What is the activity?

**Reunion Tours**

RHSF works with alumni classes to set up a reunion tour of Roosevelt High School on the Saturday morning during the weekend of their class reunion.

b. Who conducts the activity?

RHSF Alumni Events & Relations committee and other Board members volunteer each fall and spring at alumni reunion weekends, to offer building tours and connect with the Roosevelt community.

c. Where is the activity conducted?

The tours take place at Roosevelt High School.

d. What percentage of your total time is allocated to the activity?

The percentage of RHSF’s total time allocated to reunion tours is approximately two percent (2%).

e. How is the activity funded (for example, donations, fees, etc.) and what percentage of your overall expenses is allocated to this activity?

Each time a reunion is hosted, it costs eighty-four dollars ($84). There are also minor printing and management costs. The yearly total for costs is one thousand and five hundred dollars ($1,500).

f. How does the activity further your exempt purposes?

Providing an opportunity for alumni to come back and visit the school allows them to continue to be a part of the Roosevelt community and encourages donations to support their school.

**YEAR-END CONNECT MAILING**

a. What is the activity?

**Year-end Connect Mailing**

RHSF organizes an annual mailing drive, the Connect fundraiser, each November and December.

b. Who conducts the activity?

RHSF Project Manager and Graphic Designer lead the project with guidance from the Marketing and Communication Committee.

c. Where is the activity conducted?

This fundraising effort is handled via direct mail through the United States Postal Service, as well as on social media and through RHSF’s e-newsletter.

d. What percentage of your total time is allocated to the activity?

The percentage of RHSF’s total time allocated to the Connect Annual Appeal is approximately five (5%).

e. How is the activity funded (for example, donations, fees, etc.) and what percentage of your overall expenses is allocated to this activity?

The CONNECT Mailing has an average yearly cost of five thousand dollars ($5,000). The cost includes graphic design fees, printing and postage. The CONNECT mailing is approximately eight percent (8%) of the overall expense budget.

*The total expenses related to the scholarship program is $X.*

*The figure $X represents Y% of RHSF’s total expense.*

f. How does the activity further your exempt purposes?

The funds raised through CONNECT Mailing support other work including scholarships and grants.

***ROOSEVELT FOR GENERATIONS* CAPITAL CAMPAIGN**

a. What is the activity?

***Roosevelt For Generations Capital Campaign***

The primary purpose of the three million dollar ($3,000,0000) capital project is to improve the facilities and student experience at Roosevelt High School, to better serve an increasingly diverse student population, and ensure excellence in 21st-century education.

*Roosevelt for Generations* consists of two major projects, described as follows:

***Track and Field***

This project will include a renovated track and field. The current track and field will be removed and replaced in the same location with state-of-the-art track surfacing and a synthetic turf field. The project will also include updated fencing, safer sidewalks, new signage, and landscaping beautification. This project is important to Roosevelt for many reasons and the space will be a multipurpose community asset: it serves one of Iowa’s largest marching band, and is the practice field for a re-emerging football program, a storied track and field program, and a growing soccer program. During the school day, the track can be utilized by physical education classes for nearly two thousand (2,000) students. The space is open to the public after school hours and serves as a community recreation field.

***Library Reimagined***

This project will renovate the Roosevelt library into a learning and innovation center: a “library reimagined” to support current and evolving needs in technology, communications, and development of 21st century skills. It will be a site for class work, small group projects, and independent research. The space has not had updates in forty (40) years, and needs amenities for multimodal learning and modern research needs. The learning and innovation center will be in the same location as the current library and will include reconfigured spaces including flexible, collaborative learning spaces, docking stations for computers and research resources, and presentation spaces with updated technology. Traditional resources including books, periodicals, and school archives will also be preserved.

b. Who conducts the activity?

The RHSF Board of Directors, Capital Campaign Committee, Capital Campaign Finance Committee and Capital Campaign Fundraising Co-Chairs and Cabinet, fundraising consultant, and Des Moines Public Schools have worked together to develop the campaign priorities, develop project designs, and solicit donations.

c. Where is the activity conducted?

Development of project plans and solicitation of donations generally occurs in-person with respective consultants and donors. Online meetings and phone calls are often used as means to communicate as well.

d. What percentage of your total time is allocated to the activity?

The percentage of RHSF’s total time allocated to the *Roosevelt for Generations* Capital Campaign is approximately twenty percent (20%).

e. How is the activity funded (for example, donations, fees, etc.) and what percentage of your overall expenses is allocated to this activity?

Expenses involve hiring design consultants to facilitate and complete the design. Expenses include hiring fundraising consultants to develop and implement a strategy to achieve the fundraising goal. (The contract for employing capital campaign consultants is attached in the Appendix). The fundraising is being done exclusively by twenty (22) volunteers who are members of the Capital Campaign Fundraising Cabinet. An additional expense is paying RHSF’s independent contractor to assist with general administrative tasks and general fundraising activities.

*The total expenses related to the scholarship program is $X.*

*The figure $X represents Y% of RHSF’s total expense.*

f. How does the activity further your exempt purposes?

This capital campaign will improve the building and grounds, and the experiences of education and extracurriculars (including marching band, soccer, football, track and field) at Roosevelt High School. Further, it will provide these assets to future students and the greater Des Moines community.