

## Roosevelt Foundation Overview Document

**Mission/Vision:** the betterment for the kids and immediate community.

**Target Audience supported:** Roosevelt as a school, students, and teachers.

**Communication Target Audience:** Donors, Potential/Future Donors, Alumni, current students/parents

**Priorities/Goals as a whole:**

1. Help create opportunities for scholarships and the value of the high school academic experience.
2. Be the non-school public face of the high school that provides a collective vision.
3. Be a voice, advocate, and fundraising arm for 21<sup>st</sup> Century amenities that benefit Roosevelt and the surrounding community.

**Identified Strategies:**

1. Fundraising
2. Events (Community Outreach and Marketing) – Alumni Hall of Fame, Ryder Cup, R Party
3. Fund distribution: Scholarships, teacher support grants, capital projects

**Values:** Diversity of and Passion for Roosevelt. Community Connectedness. Public Education.

**What internally needs to happen so the Roosevelt Foundation sustains and develop?**

**Financials:** Quickbooks, monthly and analytical reports, Donor receipt tax letters. 990s. Separation of duties.

**Customer Service:** manage incoming phone calls/emails. Coordinate alumni services and relations: communications, reunions, and responding to requests for information

**Operations:** Administrative support -board and committees, mail, database management, record cleaning, event registrations, online giving forms

**Event Planning and Management:** Ryder Cup, R Party, Hall of Fame, Scholarships

**Fundraising Plan:** donor identification, donor cultivation, donor relations, planned giving strategy

**Marketing/Communications:** Events, fundraising, e-newsletter, annual appeal, website management, social media, general outreach, brand and community awareness

**Board member Management:** onboarding, training, accountability

**Document creation:** Board and staff manual/handbook, Organizational policies

Develop internal and external processes – systems, staffing, donor relations, history

**Strategic planning and vision** – leverage events, action and work plans

**BOARD gaps:**

Board training. Recruitment and engagement of new board members. How do we ensure diversity is valued and lifted up as a strength? Procedural issues. Legal requirements. Fiduciary responsibilities. Exposure issues.

Board expectations

Board term limits and staggering roll-off process. Continuity on the board.

Board recruitment.

Committee recruitment

Audit

Board and staff policies. Have some; Need others.

Operational manual.

Succession planning/work plans

Clarity around best practices

Board engagement. Need longer and/or more frequent meetings.

Donor engagement

Lack of controls.

Comfort level with asks. Can talk programs, but not good with asking for \$\$.

When do we serve as a fiscal agent? Fiscal agent document and process.

Mission and vision, principles and differentiation. **Mission drift.**

Conflict of interest and when do you abstain.

Bookkeeping/Accounting.

Messaging. Need to understand what we do and what we are about.

Organizational structure/clarity.

Turnover/Age diversification on board

Leverage board expertise and talents

Map of who is working for the benefit of Roosevelt. (Principal could help).

Miss in-person meetings and side conversations that can occur.

Really wants to take advantage of the time right now. Advocacy?? Palpable energy....

*If it's a part-time gig, can you get someone who is interested and can balance with another part-time opportunity, etc.*

*Full-time: is there enough to keep them busy. If so, what have we missed by not having that person.*

**1. When we think of the next iteration of the Roosevelt Foundation, what would you like to see in a board and staff configuration?**

Committee Structure: Community Events and fundraising (R Party and Ryder Cup), Education and engagement (Scholarships), Special Requests, Communications and Marketing, Alumni Events and Relations (Reunion tours of Roosevelt – ideally with the principal, Hall of Fame, Academic Awards Night at Scholarships). Used to have memberships with groups who would meet. Committees are great for passion, personal expertise, etc. Every board member is part of one of these committees. Committees meet on their own, usually out of necessity. Committee structure works well. Go through quickly and share out but would like more ways to highlight what's important to know about what's going on.

Contract out accounting.

An E.D. that can ramp up fundraising and outreach at the school.

2 PT could work, but not certain you could find the right people.

Pledges to come in over the next few years.

Donor stewardship; donor relations.

Wants to make sure that we grow in a way that's sustainable and strategic.

Systems for recruitment.

*Full-time Executive Director. Ingrained in that community. Needs to play well and listen to others. "Their job is to fundraise." ED could run these, but the ED will not have the support to run events in the current structure/board support. Vision with processes.*

*Plus PT person for admin. Event capacity or interest to do events. Daily bookkeeping entries. Donor communication. Patient. People skills.*

*Rider Club is for athletics and there's some tension there. Need timelines and plans for various events.*