



CTCEF...

Facilitating the creation, growth, and effectiveness of local education foundations in Connecticut

Application for Annual Affiliation

Benefits of affiliation include:

- Ready access to the expertise of CTCEF board members
- Discounted registration fee for annual CTCEF conference
- Periodic e-mail news and updates
- Notification of board meetings
- Compilation of CTCEF surveys

Education Foundation Affiliate

(Dues on sliding scale based on yearly income)

- _____ \$250 Annual budget over \$250,000
- _____ \$100 Annual budget up to \$250,000
- _____ \$ 75 Annual budget up to \$100,000
- _____ \$ 50 Annual budget up to \$15,000

Corporation \$50 _____

Municipality/School District \$250 _____

Individual \$ 50 _____

Please call 203-227-9323 with any questions.
For more information and/or additional copies of
this form, visit www.ctcef.org.

_____ I am already an Affiliate and want to do more.
Here is my tax-deductible contribution of \$ _____.

_____ I am not an Affiliate but want to support CTCEF
with a tax-deductible contribution of \$ _____.

_____ My company matching gift form is enclosed. \$ _____.

_____ I am interested in becoming more involved with CTCEF.
Please contact me.

Individual Name _____

Title _____

Organization _____

Address _____

City _____ State _____ Zip _____

Telephone _____ Fax _____

E-mail _____

Detach this portion and mail to: CTCEF
P.O. Box 1032
Weston, CT 06883

Board of Directors

Liz Stokes, President
Weston Education Foundation

Martin Rauch, Vice-President
Cheshire Education Foundation

Dougie Trumble, Secretary
Foundation for West Hartford
Public Schools

Gail Kelly, Treasurer
Newington Education Foundation

Woody Bliss
Weston Education Foundation

Joseph V. Erardi, Jr.
Watertown Public Schools

Marge Hiller
Bridgeport Public Education Fund

Judy Rovins
Rovins Educational Group

Patti Scussel
New Haven Network for
Public Education

Cinda Spavins
North Stonington Education
Foundation

www.ctcef.org

*Interested in making
your foundation
more effective?*

*Plan to attend this
year's conference on
October 17. Look for
registration information
at www.ctcef.org
in August.*

CTCEF...

Facilitating the creation, growth, and effectiveness of local education foundations in Connecticut

Elements and Characteristics of a Successful Foundation

To prepare for a panel presentation at a conference in Chicago, I sent CTCEF affiliates three questions to answer. Twenty percent of them responded with detailed answers. Following are the questions and some representative responses about how we measure success in our education foundations.

How do you define success for your education foundation?

Litchfield Education Foundation -

- number of grants awarded to schools; number of projects that wouldn't exist if no LEF
- involvement/engagement of board members (attending meetings, supporting fundraisers), community (supporting fundraisers), and schools (number of grant applications)

Norwalk Education Foundation -

- when NEF has a seat at the table where issues are discussed and decisions are made
- when local businesses look to NEF for unbiased and accurate information about education in Norwalk
- when NEF programs engage students and open opportunities

Vernon Education Foundation -

- raising money to support education-related goals

How does a foundation become successful?

Litchfield Education Foundation -

- engaging the community, schools, and its own directors by providing great innovative programs, projects, and equipment for the schools and advertising those grants/projects. When a project/grant is exciting, it generates enthusiasm and energy in the board, in the community, and especially in the schools, which leads to more grant applications, more community awareness, and more community involvement in fundraisers.

Tolland Education Foundation -

- by adhering to its mission, maintaining autonomy, and maintaining momentum
- by maintaining a fully engaged, multi-talented board of directors
- by continuously marketing itself to the community
- by learning from other established foundations how best to raise and distribute funds
- by creating and maintaining excellent official documents (bylaws, applications, grant follow-up reports, etc.)

What are examples of your success?

Most of the respondents listed specific grants awarded, which ranged from mini-grants to major programs and capital projects. Others referred to:

- strong community support
- collaboration with schools to create projects
- surrounding towns calling for advice/help to build programs or an education foundation

One education foundation president reported that her board was going to use the questions as a basis for strategic planning. The strategic planning process can address the elements that contribute to a successful education foundation, including board members, project ideas, communication, fundraising, and continuity. The process can be a day-long retreat or broken up into a series of discussions.

Thank you to the individuals from the foundations in Litchfield, Tolland, Bristol, Norwalk, Cheshire, Stonington, Bridgeport, Vernon, and Darien for your very informative responses to the questions.

Liz Stokes
President, CTCEF

Tax Tips

Connecticut Sales Tax Exemption Forms

A 501(c)(3) organization is exempt from paying sales tax on purchases of goods or services for its own use. The purchase must be paid for by a credit card or a check in the name of the organization. Cash purchases, in most cases, are no longer eligible for exemption from sales tax.

Form CERT-119 is the form that is used for most purchases. It should be completed and signed by an officer of the organization. A copy of the IRS letter granting 501(c)(3) status must be attached. This form, when retained by the seller, is good for any purchases made within one year. It is also the one to use when purchasing goods or meals for resale at up to five fundraising events during a calendar year. Read the instructions carefully to be sure the event qualifies.

The form, with instructions, is available from the Department of Revenue Services at www.ct.gov/drs. Click on Forms, then choose Sales Tax Exemption Certificates. Scroll down through the list and click on CERT-119. The form can be filled in online or downloaded and returned by mail.

Charitable Contributions

The IRS has various requirements for acknowledgment and disclosure by a charity of contributions received. The acknowledgment letter must include the amount of the donation, the tax year the donation was received, the deductibility, and the value of goods and services furnished, if any. For a fundraising event that provides goods or services, the value of the goods or services may be disclosed in the solicitation for the event.

Examples of acknowledgment letters follow. Note that the dollar amounts reflect the minimum amounts that generate IRS requirements and/or penalties.

Dear

Thank you very much for your recent contribution of \$250.00, which [the organization] received during the 2006 tax year. Your contribution is fully deductible for federal income tax purposes. No goods or services were received in exchange for your gift.

Dear

Thank you very much for your recent contribution of \$75.00, which [the organization] received during the 2006 tax year. The amount of your contribution that is deductible for federal income tax purposes is limited to the excess of your contribution over the value of the tickets you received. In our opinion, the value of the concert tickets was \$xx.xx.

Gail Kelly
Treasurer, Newington Education Foundation and CTCEF



Stretching Resources through Collaboration

As a newly formed local education foundation, the Waterford Education Foundation (WEF) had to decide how to make an impact in its community with very little resources. We decided that collaboration with other organizations was the way to go. One of our board members also serves on the board of the Johnny Mercer Foundation and he helped the two parties coordinate a joint program for the children in the Waterford School System.

The mission of the Johnny Mercer Foundation is to introduce elementary school students to the songs of Johnny Mercer and other great American songwriters. The Foundation had been offering its workshops in NYC but wanted a more national presence. It agreed to come to Waterford in January 2005, marking the first time the workshops had been conducted in Connecticut.

In 45-minute workshops conducted by Camp Broadway for the Johnny Mercer Foundation, 4th and 5th graders learned how Mercer came up with such classics as "Come Rain or Come Shine" and "Jeepers Creepers." They were taught about the power of creativity in music and lyric composition. And fairly quickly, they were writing their own lyrics and setting them to the beat of rap and pop.

"Our teachers expose students to writing every day, but this is an important way to focus on the creative process outside of traditional ways," said Quaker Hill School Principal Glenda Dexter.

In May 2005, the Johnny Mercer Foundation came back to Waterford to conduct a two-day weekend workshop at the Eugene O'Neill Memorial Theater Center for students who had completed the winter program. Graduates of that program put on their own performances to an audience of parents, teachers, and the public. The workshops were offered for a second time in the winter of 2006, this time to 4th graders.

As the sponsor, WEF used the opportunity to promote its mission of enhancing and enriching educational and cultural opportunities by offering programs that the school system might not otherwise be able to offer.

Judy Constantine
President, Waterford Education Foundation

No More Pilots! Norwalk Education Foundation Goes Cold Turkey

When the Norwalk Education Foundation started in 1997, we assumed we would give grants to teachers, fund interesting pilot programs in some of our 19 schools, and gradually turn one or more of these pilots into district-wide efforts. We researched programs, found funding, and ran programs. And then started all over again. And again. And again. No pilot ever turned into a city-wide program. No funding magically appeared to take a pilot city-wide. Schools didn't clamor for our pilots; they never even saw them in action.

So, we decided No More Pilots. If we want to work district-wide, which is one of the important ways education foundations are different from PTOs, we need to stop working so hard on "one-off" programs and start designing district-wide efforts.

West Hartford Cooks for Education

Thirty-five local celebrity chefs donned their aprons and dished out their gastronomic delights to hungry patrons on April 1 at West Hartford Town Hall. The fourth annual West Hartford's Cookin' event raised about \$45,000 for the Foundation for West Hartford Public Schools. Chefs included Lieutenant Governor Kevin Sullivan, State Senator Jonathan Harris, Town Manager Barry Feldman, and Mayor Scott Slifka, as well as school administrators, Board of Education and Town Council representatives, local shopkeepers, and community leaders. Ann and Joe Howard, owners of Apricot's Restaurant and Ann Howard Caterers, served as honorary chairpersons. The "celebrities" took their stations around the auditorium while appreciative patrons tasted the variety of international food ranging from Spanish tapas to Greek baklava. A food-related silent auction provided enticing offerings, including wonderful baskets from all 16 school PTOs. The evening culminated in a live auction that included a week's vacation on Kiawah Island. West Hartford's Cookin' was made possible by other collaborative efforts: musicians from Conard High School, servers from Sedgwick Middle School, generous sponsorships from businesses, and in-kind donations of wine, coffee, food, and items for silent and live auctions. Of course, none of it would have happened without a dedicated group of volunteers.

The Foundation for West Hartford Public Schools was founded in 1997 and has awarded nearly \$500,000 to the schools for mini- and professional-in-residence grants, pre-school scholarships for families in need, and technology initiatives.

Dougie Trumble
Foundation for West Hartford Public Schools and Secretary, CTCEF



Mayor Scott Slifka, Lt. Gov. Kevin Sullivan, and State Senator Jonathan Harris (left to right) prepare to cook up a storm.

Surprisingly, running big programs isn't that much harder than running smaller ones. They all take more work than we have time for so you might as well aim high. We build programs with steering teams that collaborate to design and evaluate the program; we take the lead in management and funding.

An example is our two-year-old project, the AfterSchool Achievement Program (ASAP), which now runs in 11 of our 12 elementary schools. Four years ago, NEF was funding pilot after-school ideas here and there while some schools in Norwalk continued to close their doors at 3:00 p.m. no matter what we offered. We went to the superintendent and challenged him to get his elementary school principals to ALL agree to daily after-school programs at their schools. NEF acted as a "critical friend" to the school system (another way education foundations are different from PTOs) by both pointing out what wasn't up to par and then offering to help design and fund a solution.

ASAP's steering team includes NEF's after-school program manager (a position we created once ASAP was up and running and we realized it needed a paid point-person), the school system's head of elementary education, an ombudsman from the Norwalk AfterSchool Alliance, the head of the city's Department of Youth Services, and the Assistant to the Superintendent. We meet monthly. NEF raises about 75 percent of the money, with the school system giving the rest.

It's a collaboration. It's messy. The budget numbers sometimes keep me up at night. But it is really no harder than working in a scattered way on this after-school issue. And I know that NEF is pushing our district toward what is best for Norwalk students. And that lets me sleep.

Dorsey Weber Gude
Former Executive Director, Norwalk Education Foundation

A Proposal to Increase Your Donations

A workplace campaign is an excellent opportunity for employees to designate a portion of their income to causes that are important to them. Many employers match employee gifts, making individual contributions even more significant. Education foundations with 501(c)(3) status are eligible to be designated as recipients of employee contributions through corporate workplace campaigns and matching gift programs.

We encourage Avon residents to designate the Avon Education Foundation during their workplace campaign or matching gift program by writing in our name, address, phone number, EIN, and e-mail address. We have received significant contributions this way.

I believe we can increase the benefits we receive from workplace campaigns. I propose directly asking corporations to include all of the education foundations in Connecticut as a choice for an employee's designated charity. I will need help from board members of other education foundations in order to implement this proposal. I invite you to help coordinate this effort to increase your donations.

Please contact me at:
860-679-9236 or at suebertolini@comcast.net.

Sue Bertolini
Chairman, Avon Education Foundation

2006 Foundation Celebrations

Watch for a letter from CTCEF board members Liz Stokes and Joe Erardi explaining how to apply for a 2006 Foundation Celebrations Award. Two foundations, one emerging and one established, will be recognized at the October 2006 conference. Applications are due by September 8.