

Hamilton Southeastern Schools Foundation Case Statement

Maintaining Excellence at Hamilton Southeastern Schools

While many public school districts around the country have struggled with issues surrounding the quality of instruction and student performance, Hamilton Southeastern Schools is justifiably proud of a superior educational experience. Although HSE has been Indiana's fastest growing district for more than a decade, its students have continued to achieve at a high level, consistently performing in the top ten in state measures of student performance. Over 90% of those students plan to pursue post-secondary education (83% at a four-year institution, 9% at a two-year institution, and 2% at a vocational school), and the district's high schools are recognized by state and national publication rankings for rigor and excellence.

One challenge that nearly every school system faces, however, involves funding. In the last 20 years, Indiana school budgets have been adversely affected by:

- property tax caps.
- a state legislature that distributes school funding at its discretion and has provided less than adequate funds to maintain educational excellence.
- strained state and local budgets.
- the rise of charter schools (diverting money from public schools).

Certainly, HSE is among the schools compelled to do more with less. Tighter budgets have meant fewer hires, larger class sizes, and fewer dollars for instructional equipment and materials. The district's per student dollars rank dropped from **58th highest out of 293** districts in 1992 to **357th out of 363** districts in 2013.

While nearly every state is finding school funding ballot issues more and more difficult to pass, Indiana's challenge is particularly glaring. According to the Coalition for Public Education, since 2008 neighboring states Illinois, Michigan, and Ohio have passed funding issues at an average rate of approximately 62%; Indiana is averaging only 41%. Further, a 2012 Indiana State Teachers Association "costing-out" study concluded that Indiana school spending was "less than the estimated amount needed to provide an adequate education." Again, Hamilton Southeastern has bucked the trend, so to speak, as taxpayers have passed three referenda in the last five years, two for construction of new facilities to accommodate growing enrollment and one to supplement operations. Having said that, even this highly engaged community is tiring of being asked repeatedly to pay more due to less dollars coming from the state.

If you believe that strong communities are a direct result of strong schools, and if you accept that an essential lynchpin of a democratic society is the provision of a free, accessible education experience for all, then a wholesale shift in how we approach paying for education is in order. Clearly, relying solely on local, state, and federal tax-based revenue streams alone is no longer a sufficient answer for offering innovative and creative educational programs.

Hamilton Southeastern Schools – your school district – has an answer.

Bridging the Funding Gap through Grants and Scholarships

The Hamilton Southeastern Schools Foundation (HSSF) was founded in July 2001 as a 501(c)3 non-profit organization to benefit Hamilton Southeastern Schools by providing educator grants and student scholarships. While a *Dollars for Scholars* program had been providing scholarships since 1986, Hamilton Southeastern Schools' board members and superintendent at the time felt more needed to be done to provide financial support to a rapidly-growing district. An educator grants program was added to scholarship activities, and HSSF was born.

With the essential support of the Hamilton Southeastern Schools Board of Trustees and alumni, HSSF immediately connected private-sector support to the educational community, impacting programs and projects from kindergarten to high school. A part-time executive director came on board early in 2003 and now serves HSSF 30 hours per week. A board of directors features a balance of business, professional, community, and educational leaders and includes alumni and student representation.

With the ultimate goal of enhancing educational excellence, HSSF is an innovative solution to the district's funding challenges. It secures funding from corporations, businesses, individuals, and organizations to bridge the gap created by dwindling traditional revenue streams to fund grants and scholarships that enhance academic excellence.

Similar to traditional community and corporate grant-making entities, HSSF receives grant requests from district educators, weighs merits of applications based on potential student impact, and awards funds. Since its inception, HSSF has provided over \$300,000 in grants. Examples of recent grants include:

- iPod touches and applications to support HSE 21 initiative and Common Core Standards in Language Arts
- engineering binders to aid hands-on science curriculum for over 300 students for *Engineering is Elementary!* program
- *We All Can be Fit-Clearing Our Minds of "Can't"* equipment to integrate a fitness-based physical activity program assisting special needs students develop motor skills and confidence
- high-tech hardware and software educational tool, Activslate, to enhance the delivery of math instruction

In recent years, larger commitments have also been made, including a \$60,000 pledge for a district-wide grant for *Fitnessgram* and a \$10,000 grant to the HSE21 initiative. Clearly, HSSF has supported a balance of innovative academic and developmental programs.

Scholarships funded by HSSF also off-set tuition for college-bound students. To date, over \$700,000 has been awarded, and in 2013 alone, seniors from Fishers High School and Hamilton Southeastern High School benefitted from over \$80,000 in scholarships. Several funds help make it possible for qualifying graduates to continue their education.

Raising Funds from Various Events and Sources

Concerted fundraising efforts are required to fund HSSF grant and scholarship activities, and continue to supplement and replace tax-based support. To date, funds have largely been secured through a variety of events, each designed to not only raise money, but tell the HSSF story and build relationships:

Dollars for Seniors (formerly known as *Dollars for Scholars*) Telethon – originally the sole fundraiser for HSSF, this event continues to do its part to underwrite scholarships. Students contact alums, parents and community leaders for pledges and raised \$41,000 last year. Funds are divided among participating seniors to use toward college expenses.

Corporate donors – the backbone of any prudent fundraising program, HSSF provides a variety of donation opportunities. Companies are invited to support HSSF at Premium (\$25,000), Partner (\$10,000), Affiliate (\$5,000), and Booster (\$3,000) investment levels; and with each opportunity comes high visibility and recognition among the households that comprise the district. Donating also offers the opportunity to connect with new clients and partners at various HSSF-sponsored events. Individual and Family investment levels are also available.

Mudsock Week – this week in August celebrates “two great high schools, one awesome community” during the scheduled girls and boys athletic competitions. It culminates with the rival football game where HSSF offers VIP tickets and reserved end-zone seating, providing an opportunity for attendees to mix and mingle. Last year, it raised over \$14,000 from sponsorships and ticket sales.

Dinner Event – The annual dinner is one of the largest sources of funding for HSSF. The goal is to bring parents, educators, and the business community together for an evening of connecting and fund raising. This year’s dinner raised \$51,000.

10-for-10 – Commemorating 10 years of service to the district, the 10-for -10 program invites the over 70,000 citizens of Fishers to contribute \$10 each.

Annual Golf Outing – each year, HSSF holds a golf tournament. The event features 18 holes, box lunch, dinner, prizes and a raffle. This year’s tournament raised \$35,000.

Thank-an-Educator – a gift of \$10 or more enables donors to show their appreciation for a teacher, coach, administrator, counselor, secretary, instructional assistant, bus driver . . . anyone who has made a difference in a student’s life. A gift card with a personal message is presented to the honoree. \$395 was raised last year.

Geist Half Marathon – in its 7th year, HSSF partners with Geist Half for this event, which supports educational programs that address youth physical fitness by combating obesity. Communities that surround the Geist Reservoir are eligible for funding, and each year HSSF receives a grant (this year’s grant was \$30,000) that in turn funds a wellness-related grant request, including the district-wide *Fitnessgram*.

Preparing 21st Century Learners and Leaders

Although HSSF has risen to the challenge of enhancing district educational excellence, so much more must be done since HSE Schools faces the following challenges to operations that will limit the resources allocated for innovative and creative educational programming:

- District will continue to face inadequate funding based on the state funding formula.
- Recruiting the best teachers and maintaining acceptable class sizes is critical to maintaining excellence.
- The socio-economic make-up of the district will continue to change, creating more demand for grants and scholarships.
- Keeping up with rapidly changing technology will be a challenge.
- Continued professional development will be necessary to help teachers focus on 21st century learning skills.

The challenges the school district faces compel HSSF to provide more funding to support innovative initiatives that equip teachers and students with the knowledge and skills to succeed in a global economy.

Funding 21st Century Learners and Leaders Innovative Initiatives

To effectively assist the district to achieve its goal of becoming a world-class school system by developing, initiating and assessing the highest quality programs for the 21st Century learner and leader, HSSF has identified the following opportunities to help reach its goal of impacting a greater number of students:

- Increase Grants by \$75,000:
 - Classroom support
 - educator grants for innovative and creative ideas
 - Donors Choose matching (online wish lists where patrons can make direct donations)
 - School district-wide initiatives
 - HSE21 Initiative (preparing students to succeed in 21st Century global economy)
 - 1:1 technology implementation
 - Science, Technology, Engineering, Math
 - Senior Academies (e.g. sponsored rooms)
 - Professional Development
 - Various grade-level programs
 - 3rd grade dictionaries
 - 7th grade Camp Tecumseh
 - 8th grade Washington DC trip
 - Teacher sponsorship
 - Support teachers' programs that align with a donor
(E.g. Ms. Chandler's Constitutional Law program)

- Increase student Scholarships by \$20,000:
 - 10 students receive \$1,000-5,000 per scholarship

- Increase Community Awareness by \$5,000:
 - Increase funds to communicate HSSF's work and impact through presentations and enhanced community networking and communications

- Provide for In-kind Donations:
 - Student and teacher internships with businesses
 - Equipment from businesses (microscopes, chromatographs, etc.)

- Increase Endowment:
 - Sustain HSSF operationally and ensure long-term, significant, grant-making capacity

While all the identified needs will be addressed in the years ahead, growing grant-making capacity, increasing scholarship amounts, and expanding community awareness funding are the most pressing. It is projected that \$100,000 will be required for those immediate needs this year, and position HSSF to lay the groundwork for a significant endowment campaign in the years ahead.

Ensuring Success for Years to Come

What separates Hamilton Southeastern Schools from many public school districts around the country and in Indiana is the courage and vision to maintain excellence by thinking out of the box. How and to what extent schools are funded has changed, however HSSF gives you the opportunity to enhance support for innovative and creative educational programs that might not otherwise be funded through traditional school revenues. Public education is local, essential, and belongs to us all. Its return on investment is evidenced by every graduate who goes to work, obeys the law, raises a family, patronizes businesses, and extends a helping hand to those in need. It deserves our best efforts; it deserves our support.

A \$100,000 major gifts campaign is being launched in August to underwrite core grant-making, scholarships, and awareness activities. After careful research and consideration, HSSF leadership has decided to address these immediate needs by approaching selected corporate, business and organization leaders, and individuals of means in a traditional capital campaign format. Recognizing that \$100,000 is only a start – and that eventually HSSF will likely secure a full-time executive director and support staff to impact educational excellence over the long term – this Phase I effort will set the stage for a significant Phase II capital campaign. Only when HSSF is fully endowed and established as a professionally-driven organization will its programming help position the district to ensure student and community success for years to come.

When asked to consider an investment in the future of your community's young people, take pride in the fact that while other school districts are challenged with antiquated funding models and struggling students, Hamilton Southeastern Schools refused to sacrifice excellence. HSSF is an answer to enhancing excellence, so please answer the call!

Frequently Asked Questions

1. *I keep voting for referenda, and they keep passing. Why do we need a foundation?*

Referenda support, while much-needed and welcomed, doesn't foot the bill. As discussed, shifts in public school funding models mean that tax-based dollars don't go as far as they used to. Add to the mix changing demographics and property tax caps, and the need to raise private-sector funds to support grants and scholarships is real and immediate. Finally, in light of so many failed referenda around the state, no one can be certain if Hamilton Southeastern ballot issues will continue to pass.

HSSF, on the other hand, presents a permanent solution. With continued community support, it will always be able to supplement traditional revenue streams by supporting teachers and projects that enhance district excellence.

2. *Which organizations have recognized and ranked Hamilton Southeastern Schools?*

Newsweek Top High Schools 2013: Fishers HS -725th nationally and 5th in Indiana (HSEHS data was not considered for this one since it was not contacted)

US News & World Report: HSEHS 676th nationally and 7th in state; FHS 698th nationally and 8th in state

Washington Post: FHS 633rd nationally and 7th in state; HSEHS 866th nationally and 10th in state

According to 2013 Estimated Tuition Support Per ADM prepared by the Indiana Office of School Finance—HSE Schools is sixth from the bottom of 363 school districts in per-student funding.

Enrollment records reported to the Indiana Department of Education show that HSE's district grew from 10,643 students in 2002 to 19,981 in the fall of 2012—No other district is close in sheer numbers.

HSE Schools has four schools that have received U.S. Department of Education Blue Ribbon status based on consistently high student performance: Fishers Elementary, HSE High School, HSE Junior High, and Sand Creek Intermediate.

Based on the percentage of graduates who passed at least one Advanced Placement exam, the district's high schools ranked fifth in the state based on 2011 numbers.

3. *Given Hamilton Southeastern Schools are among the best, why do we need more money?*

Simply put, excellence has a price. The difference between a failing or even average school system and one that effectively prepares young people to succeed in the classroom, the band room, the athletic field, and in the community is often funding. The grants and scholarships provided by HSSF purchase equipment, train educators, underwrite curricula, and assist graduates access to post-secondary education. Fishers' citizens should never have to settle for second best for their children because dollars weren't available.

4. *I noticed that HSSF holds a number of fundraisers. Is a capital campaign necessary?*

Event fundraising, even successful gatherings like those held by HSSF, rarely raise major funds. Their purpose, in addition to of course generating some net revenue, is to connect participants to HSSF and district leaders, tell the HSSF story, and build relationships for future fundraising. Given needs have grown with the district's growth over the years and HSSF's limited ability to add more events, HSSF leadership has determined that a capital campaign is necessary to increase funds to support more and larger educator grants and student scholarships.

5. *If a significant endowment campaign is a possibility in the future, why try to raise only \$100,000 now?*

In fundraising, as in just about every worthwhile undertaking, it's important to crawl before you walk. By establishing an attainable goal that underwrites immediate, demonstrable needs, HSSF leadership will present a compelling case for support, cultivate meaningful relationships with potential major donors, and directly solicit major investments. In turn, the philanthropic community will gain a comfort level with the Foundation's need to raise funds and be more likely to support a significant campaign down the road.

6. *My kids are grown and gone. What's my Return on Investment for supporting HSSF?*

Strong schools help make Fishers an ideal place to live. Property values, economic opportunities, infrastructure, safety, and recreation are all positively impacted by a school system that promotes academic, athletic and extra-curricular excellence.

7. *It would appear that operating HSSF and underwriting its funding programs is a full-time job. Is it wise to continue with only a part-time executive director?*

HSSF and District leaders understand that as HSSF grows in scope and responsibility, full-time professional leadership may be prudent. To that end, the efficacy of making the executive director position full-time is currently be researched. If HSSF moves in that direction, it is best not to include that expense in the Phase I campaign, but to secure funds from other sources.

8. *I'd be more comfortable considering an investment if I knew more about the impact of HSSF grants and scholarships.*

Now that HSSF has served the community for nearly 13 years, it can track impact. Leadership is working with HSE district officials to assess and evaluate how funding has improved student and teacher performance, supported school-based health and wellness initiatives, and helped graduates succeed in college.

In the interim, testimonials (see Testimonials section), anecdotal feedback, and the level of donations and community involvement in events clearly demonstrate that HSSF is a viable, accountable organization that makes a difference.

9. *I like what I'm learning! How do I invest?*

The HSSF Phase I Campaign is seeking \$100,000 in unrestricted financial support (i.e. funding areas to be designated by HSSF board) to underwrite grants, scholarships, and community awareness efforts. We are looking for investments by individuals and businesses to support events, provide sponsorships, purchase tickets, provide in-kind gifts, and serve as volunteers.

10. *How can I learn more about HSSF?*

For more information, go to www.hsefoundation.org, or contact Lisa Allen, Executive Director, at 317.594.4100 or hsefoundation@hse.k12.in.us

Income/Expense Statement

	<u>FY July 2011 – June 2012</u>	<u>FY July 2012 – June 2013</u>
<u>Income</u>		
Campaigns	21,215	5,655
Contributions – Restricted	84,580	68,019
Contribution – Restricted Bequest*	66,591	0
Contributions – Unrestricted	13,034	6,554
Events	130,319	136,007
Misc.	0	120
Interest Income	143	142
Total Income	\$ 315,882	\$ 216,497
<u>Expense</u>		
Administrative	482	594
Academy of Finance	14,500	10,330
Alumni	406	1,624
Bank Service Charges	1,499	961
Community Awareness	2,857	1,950
Conference	75	75
Contributions	0	50
Dues and Subscriptions	3,288	1,662
Durbin Dreams	17,717	6,146
Eye Glass Program	2,641	2,470
Events	41,434	39,038
Grants Awarded	55,274	38,480
Scholarships Awarded	75,652	72,060
Grants Committee	125	42
Licenses, Permits, Insurance	1,721	1,472
Office supplies, Software	5,460	6,593
Professional Fees, Salary, Taxes	54,363	52,960
Training, Travel, Entertainment	718	1,283
Misc	495	332
Total Expense	\$ 278,707	\$ 238,122
Net Income*	\$ 37,175	-\$ 21,625

*Income and expenses are impacted by the timing of when restricted funds are contributed and when those funds are expensed.

Board of Directors & Committees (2013 – 2014)

Executive Committee

Kevin Ephlin, President; Community Volunteer

Kristi Lowell, President-Elect; VP, Brand Strategy, FORUM Credit Union

Gavin Fisher, Secretary; Medical Sales, Novartis

Thomas Long, Treasurer; Owner, Long & Associates, CPAs

Freedom Kolb, Scholarship and Grants Chair; Manager, Agency Services, United Way of Central Indiana

Kevin Clasen, Development Chair; Financial Planner, West Point Private Client Group

Joe Eaton, Immediate Past President; Partner, Barnes & Thornburg, LLP, Attorneys

Tim Rogers, Alumni Representative; Manager, Ironwood Pharmaceuticals

Jim Thompson; President, Gibraltar Design

Tim McCoy; Agent, Source Insurance Group & Financial Services

Danielle Robinson; Manager, Boram Lawn & Landscape

Tim Calvert; COO/Business Development, American College of Sports Medicine

Douglas Stein; VP Correspondent Operations, Stonegate Mortgage

Rachael Berry; Self Employed Photographer

Susan Knight; Marketing Coordinator, Mike's Car Wash

Joe Olexa; Senior Portfolio Manager/Financial Advisor, Morgan Stanley Smith Barney

Lyn Reed; Physician Liaison, Community Health Network

Jean White; Owner/President, Hammer Marketing and Media

Susan Binford; District Leader, Binford Group of Indiana

Kelly McNairy; VP, Sr. Relationship Manager, Key Bank

Jody Valerio; Director, Marketing and Travel Procurement, Sallie Mae

J. Bruce Wright; Detective, Lawrence Police Department

Dr. Brian Smith, Ex-Officio; Superintendent, HSE Schools

John DeLucia, Ex-Officio; Executive Committee, HSE Board of Directors

Student Representatives

Molly Gogol, FHS

Meghin Lux, FHS

Cam Reitz, FHS

Hannah Conrad, HSEHS

Jessica King, HSEHS

Samantha Zuber, HSEHS

Committees

Executive

Alumni

Budget & Finance

Events

Community Awareness

Development

Grants

Nominating

Scholarships

Student Board Development

Testimonials

Dr. Brian Smith, Superintendent, HSE Schools

Although the Hamilton Southeastern School District is viewed by many as an affluent school district, it is among the lowest funded in the state. Consequently, the schools cannot provide many of the educational services and programs that other districts can afford to offer.

Enter the Hamilton Southeastern Schools Foundation.

HSSF is amazing. Its membership is a group of dedicated community leaders who provide funding for educational opportunities when the district lacks the financial means to do so. They do all this in concert with school administrators and teachers. The lines of communication are always open. I don't know what we would do without them!

Beth Niedermeyer, Assistant Superintendent, HSE Schools

HSE schools benefit so much from the hard work, dedication, and generosity of the Hamilton Southeastern Schools Foundation. Their support for our students, teachers and district initiatives is critical to our success. Whether it is funding classroom teacher grants or district wide initiatives like HSE21 that impact all of the schools, their influence is far-reaching and impactful. The HSE staff looks forward to our continued collaboration with HSSF to prepare our students and teachers for the teaching and learning skills required for the 21st Century school and work environments.

Michael Roederer, Fishers High School Class of 2011

The Hamilton Southeastern Schools Foundation not only enhances students' education in the HSE district, the foundation also positively impacts the whole entire community of Fishers. As a previous student non-voting member I had the opportunity to serve on the board with other students and outstanding leaders in the community. As a team we worked together to provide grants, scholarships, and ultimately improve the quality of education for the students. Dollars for Scholars is an exceptional program that gives students in the community an opportunity to get involved and help raise scholarship money for themselves and fellow peers. I helped raise over a \$1000 that went directly towards scholarship funds for graduating students. The Foundation is an incredibly beneficial asset for the students, families, and community of the HSE district.

Karen Boyd, Wellness teacher/Department Chair, Hamilton Southeastern Junior High, Fitnessgram District Coordinator. *Teacher of the Year 2012*

It is my honor and pleasure to write this testimony for the value and blessing the HSSF has been to me personally as a health educator, to my department and to the promotion wellness throughout the district. Without their assistance, the level of rigor and 20th century technology would not be available to

the students we reach. Simply put, we as a Wellness department would not be able to keep up with the current trends in Health and Fitness without funds created by HSSF.

I have been a recipient of HSSF grants for about six years. I have received grants that have included implementation pieces for whole group instruction, fitness lab equipment, team-building programs, and state of the art instructional technology. These grants themselves dramatically change the way we are able to instruct students to give them the best educational experience possible.

On a larger scale, the HSSF has equipped the HSE school district with the tools to help set a wellness standard around the state. Through their funding efforts with the Geist Half Marathon, we were able to establish Fitnessgram testing in our district for students in grades 4 through 8. This program has redefined our commitment to health and fitness standards for these children at the most critical time in their physical and mental growth and development.

I have so many reasons to be proud not only to raise my own children and teach in the HSE district. But, at the top of the list has to be the community support for teachers that promote “raising the bar” on the educational experience each and every year. This support is evident in the money raised through HSSF to assist in making those goals reality for many teachers and the students they serve.

Susan Drumm M.Ed., M.L.S., HSE Instructional Technology Coach

Hamilton Southeastern Schools Foundation is an indispensable backbone of support and encouragement to me as an HSE educator. In this tough financial climate, HSSF is a vital partner, providing resources that enable me to incorporate best instructional practices – personalizing learning and giving students the knowledge and skills they will need to succeed in the 21 Century global economy.

Bill Benner, Parent, Former Board Member

As a parent of two HSE graduates and one of the original board members, it was an honor to participate in building the foundation of HSSF, knowing that the results of our initial initiatives would help ensure that Hamilton Southeastern Schools commitment to excellence in education will continue for the benefit of students, parents and educators. I am deeply gratified to see the growth of the support and the broadening of reach of HSSF in its ensuing years. HSSF is not merely meaningful, but necessary.

John Weingardt, Fishers Town Council President and Former Board Member

Hamilton Southeastern Schools, in my opinion, are one of shining stars in our community. Moreover, the HSSF continues to complement and enhance our schools, student, teachers, and our community by providing grants and scholarships. HSSF works in concert with our schools to provide educational opportunities that only drive the quality of education even higher. Whether it is a grant for a science project or scholarship for college, HSSF thoughtfully provides funding and support for the betterment of our teachers, students, and the town of Fishers.

Sara Curran, Principal, Thorpe Creek Elementary

Hamilton Southeastern Schools Foundation directly supports and enriches student learning opportunities. I have received two grants from HSSF. The first was for a classroom set of headsets with microphones. Elementary students throughout the district used these headsets for project based learning experiences. Students recorded original poetry into software using the headsets and then designed visuals to complete the multimedia poetry projects. The second grant was for two iPads for students at Fall Creek Intermediate School. These iPads were used for research, collaboration, and creation. The support of the Hamilton Southeastern Schools Foundation is invaluable and provides opportunities to take learning above and beyond.

Chuck Sadler DDS MSD, Orthodontist and Community Leader

My wife and I have lived in Fishers for over 25 years. During that time we have been involved with many great organizations that have benefited this diverse and growing community. HSSF continues to lead our community as well as the young minds that will eventually be the leaders of tomorrow. From grants for teachers to expand the way we educate our youth, to scholarships that provide much needed assistance to students applying for college, we should feel blessed to have such a strong presence in our school system. Through my interactions with board members and the executive director, Lisa Allen, over the years, I feel proud that we have a program in our community that is second to none.