



2018 - 2019
ANNUAL REPORT



A LETTER FROM OUR CHAIR



It's an honor to serve as chair of the Spring Branch Education Foundation for the second year. I am pleased to submit this report sharing our accomplishments and financial results for this fiscal year.

As you'll review in this report, we've experienced growth in all key

measures. Our financial results are improved. Our events continue to bring more community members together in support of SBEF. We have developed processes for supporters to include SBEF in their estate planning. We also continue to grow in flow-through funds from community members and businesses enabling us to support individual school and district programs. We're providing more college scholarships; in addition, exemplary students are receiving greater amounts. We've increased the number of school and district grants awarded, and long-time district programs have received greater grant amounts.

These extraordinary results could not have been accomplished without the commitment of my 72 peer board members. It is a pleasure to work with them. Our partnership with the school PTAs and the PTA Council is an enabler to much of our success. We are fortunate to support SBISD. The schools, the administration, our Board of Trustees and our new superintendent work in partnership with SBEF to deliver programs aligned with district goals benefitting every student. Finally, our small and committed staff continues to deliver exemplary and improved results every year.

I encourage you to get to know SBEF better. You'll quickly realize why your friends and neighbors are joining me in saying, "I love SBEF."

Jennie V. Baker, Chair
Spring Branch Education Foundation

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*Executive Committee

OUR MISSION

Spring Branch Education Foundation is committed to supporting our students and educators. We partner with Spring Branch ISD and the community to fund programs that enhance education and prepare our students for the future.

Our Challenge

Like public school districts around Texas, SBISD benefited from the 86th Legislature's passage of House Bill 3. It provided a much-needed infusion of funds for public education while providing tax relief for taxpayers. We are grateful for the relief; however, SBISD continues to operate with an estimated \$9.8 million deficit under the FY2020 budget approved by the Board of Trustees in June 2019. SBISD will pay an estimated \$35 million in recapture payments, now known as Excess Local Revenue, to the state this school year – double what the district will receive from the state in formula funding.

Our Solution

Private funding, through the Foundation, remains in the district and helps enhance our quality of education. For the last five consecutive years, SBEF has donated more than \$1 million to the district, reaching students on all campuses.

Support SBEF

Together, we can achieve our goal of excellence in education for every SBISD student. Donations can be designated for specific district or campus projects. Donors are recognized district-wide, and all donations are tax deductible.

SIGNATURE EVENTS

SBEF's fundraisers are not-to-be-missed events with a purpose. These volunteer-driven occasions support the Foundation's mission while bringing community members together to visit with old friends and make new ones. From sporting events to dress-up affairs, you don't want to miss out.



Visit springbrandeducationfoundation.com for sponsorship and registration information.

YOUR GIFTS AT WORK

In 2018-19, Spring Branch Education Foundation gifted our partner, Spring Branch Independent School District, \$1,389,549. Your gifts enhance the education of Every Child.

CAMPUS GRANTS

Grants up to \$5,000, which are available to every school, are springboards for innovation. Each grant funds a project with the potential to be developed on a larger scale and become standard across the district, making SBEF part of the district's research and development pipeline.

Our grants are as wide-ranging as each applicant's imagination. Many are part of four major categories. Some examples:

LITERACY - The library at Edgewood Elementary received bike-like desks to promote action-based focus and reading comprehension. Students at Hollibrook Elementary received books to encourage holiday and summer reading.

STEM/STEAM - Ridgecrest Elementary received a sound system for students to learn audio engineering and the science of sound. Technology and software for Rummel Creek Elementary benefitted music, art and health fitness programs. Spring Branch Middle received technology for a new elective, which includes robotics and coding.

INNOVATION - Spring Forest Middle received equipment for a broadcast journalism elective. Students at Westchester Academy for International Studies designed group and individual focus areas. A Love and Logic program helped Wilchester Elementary students build bridges of mutual respect.

SCHOOL SUPPLIES - Economically disadvantaged students in every SBISD Title 1 elementary school received the supplies they needed to start a successful school year.

SCHOLARSHIPS

We send graduates off to college with scholarships based on holistic achievements: personal qualities, school and community involvement, family life and academics. In 2019, 111 seniors received scholarships totaling \$158,150.

We invite you to sponsor a named scholarship for \$1,000 and up. Some examples of ways our community provides scholarships:

COMMUNITY ORGANIZATIONS - Wilchester Men's Club gifted \$10,000 to neighborhood graduates.

BUSINESSES - MetroNational awarded \$18,000 for Memorial City Mall Scholarships.

MEMORIALS - Warren Barfield and Judy Weisend were just two examples of loved ones memorialized with named scholarships.

EMPLOYEE CAMPAIGN - SBISD staffers provided 44 scholarships for colleagues' children who graduated from an SBISD school.

DISTRICT GRANTS

District grants have a far-reaching benefit for students throughout the district. Three examples:

ALTHARETTA YEARGIN ART MUSEUM took Road Shows to first-graders, hosted Study Trips for second-graders and offered Tall Tales and Art, a summer reading and art experience.

J. LANDON SHORT MINI-GRANTS FOR EDUCATORS provided individual grants to educators who sought transformational ways to enrich the learning environment.

SPRINGBOARD MENTORING PROGRAM paired hundreds of students with adult community mentors, building student self-confidence as well as communication and interpersonal skills.

FUND FOR THE FUTURE

The Fund for the Future endowment is a permanent fund that perpetuates our community's commitment to outstanding education.

Begun in 2008, with an initial goal of \$1 million, the Fund now has a balance of more than \$1,550,000. The earnings provide a lasting, stable source of income ensuring the Foundation's ability to continue funding district programs, campus grants and scholarships.

Based on the district's needs and a commitment to build on its success, SBEF will launch a campaign in 2020 to increase the endowment to \$2 million.

You are invited to donate to Fund for the Future as a one-time donation or three-year pledge.



SBEF'S BRIGHT STARS OF 2018-19

You, our donors, are our Bright Stars of SBEF. You make every grant and scholarship possible.
This year, we honor – and say thank you to – our Top 10 donors of 2018-19.

ROCKWELL FUND

WELLS
FARGO



ROCKWELL FUND

Rockwell Fund, Inc. made contributions to the Spring Branch Education Foundation to fund trainings and staff costs related to the system of care and school discipline reform.

R. Terry Bell
President and CEO

WELLS FARGO

At Wells Fargo, we are guided by a common purpose to help our customers and communities succeed financially. Education lays the foundation for the future success of our communities. We believe in the mission and purpose of Spring Branch Education Foundation to fund programs that enhance education and prepare students for a bright future. We are proud to be a supporter of SBEF.

Thomas B. DeBesse
Region Bank President of Houston North Region

MEMORIAL DRIVE PRESBYTERIAN CHURCH

Our gift to SBEF helps fund a position at Spring Woods Middle School that coordinates the IMPACT student mentoring program. MDPC is passionate about caring for our Spring Branch neighbors, and one small way is to help at-risk youth feel encouraged, grow in confidence and hope, and graduate from high school – to be prepared for further education and their life work ahead. The gift to our church is the opportunity for members to volunteer as mentors to these young students, which richly blesses us in return.

Jan Roe
Director of Local Missions



MICHAEL & SUSAN DELL FOUNDATION

The Michael & Susan Dell Foundation partners with SBEF to help Spring Branch ISD implement solutions that allow teachers and educators to have access to the information they need to best teach and mentor their students. As a data interoperability pioneer, the district will be implementing a student-facing dashboard that allows students to take ownership of their academic journey – providing endless opportunities to improve outcomes for kids.

Lyria Zeh
Technical Program Officer

AMERICAN RED CROSS

The American Red Cross awarded the Spring Branch Education Foundation \$66,000 to provide trauma-informed mental health services to students impacted by Hurricane Harvey. The six-month grant served 100 students at three elementary schools in heavily impacted communities, providing mental health services focused on enhancing the students' ability to cope with emotional distress and improve their academic performance.

Shannon Strickland
Grants Manager for Harvey Recovery

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MEMORIAL HERMANN HEALTH SYSTEM

We are so thankful for the partnership between Memorial Hermann Health System and the Spring Branch Education Foundation. We both share common ground that involves bettering the future of our communities, and we hope our shared aspirations help to advance the health, wellness and education of children as they grow and shape future generations.

Paul O'Sullivan
*SVP and CEO of Memorial Hermann
Memorial City Medical Center and
Memorial Hermann Greater Heights
Hospital*



METRONATIONAL

MetroNational's long-term support of the Spring Branch Education Foundation through academic scholarships and donations to FFA is a vital part of our commitment to education. We believe that by investing in students today, we ensure a better tomorrow for the entire Spring Branch community for generations to come.

Scooter Hicks
Chief Operating Officer



WILCHESTER MEN'S CLUB

We believe the programs and scholarships offered through SBEF are directly in line with our three pillars at the Wilchester Men's Club: Education, Youth Outreach and Neighbors in Need. We strongly believe that in partnering with SBEF, we are not only being good stewards of the charitable contributions by our members and sponsors, but we continue to fulfill our general objective of "Doing Good" across the entirety of SBISD.

David W. Dickey
Board Member



HEB

As a major supporter of education initiatives across the state, H-E-B believes there is no greater investment than supporting educators and encouraging excellence in learning. We are honored to be a part of realizing Spring Branch ISD's mission of transforming the school experience and ensuring a brighter future for our children and our community.

Winell Herron
*Group VP of Public Affairs, Diversity
and Environmental Affairs*



FIRST COMMUNITY CREDIT UNION

First Community Credit Union was founded by the teachers and administrators of SBISD. They are our roots and foundation and what a better way to show our gratitude than by supporting what they do. Further, we know from first-hand experience that Spring Branch Education Foundation makes such a difference in the life of the schools, students, staff and community. Being a great community partner is a part of our DNA. We are proud to partner with SBEF and Executive Director Cece Thompson.

Nancy Trennel
Chief Marketing Officer

Financials

(Year ending June 30, 2019)

TOTAL ASSETS	\$ 2,584,259
LIABILITIES	\$ 298,715
NET ASSETS	\$ 2,285,544
UNRESTRICTED	\$ 257,148
RESTRICTED	\$ 2,028,396

TOTAL LIABILITIES AND NET ASSETS	\$2,584,259
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2018-2019 OPERATING REVENUE	\$2,498,602
2018-2019 OPERATING EXPENSES	\$ 1,976,873
CHANGES IN ASSETS	\$521,729

Where your dollar went
over the last year:



WAYS TO GIVE

Your gifts make a difference

Your gifts really do make a difference! They are investments in our students and in our community. Please call us to learn more from our executive director or a member of our board. We look forward to visiting with you!

Project School Supplies

Individuals, businesses and community organizations across the district support Project School Supplies. This year, economically disadvantaged students from every SBISD Title 1 elementary AND middle school received supplies – one-third the SBISD student population! We plan to expand the project to include high school students. Our goal is for all students to begin school with the supplies they need to have a successful school year.

Employee Campaign

Throughout the school year, SBISD staff members contribute to the SBEF Employee Campaign, which funds scholarships for SBISD graduates who are children of district employees. They eagerly donate because 100 percent of their gifts funds scholarships for colleagues' children. Since its inception, the SBEF Employee Campaign has awarded 474 scholarships!

Fund for the Future

The Fund for the Future endowment was created in 2008. Gifts to SBEF's Fund for the Future are invested and never spent. Your gifts generate interest income that will support SBEF programs for years to come.

Legacy Circle

Legacy Circle members make SBEF part of their financial and estate plans to support current and future generations of SBISD students. Members decide how they want their gift to be used: an unrestricted bequest (authorizes SBEF to allocate funds according to the greatest need) or a gift to Fund for the Future endowment to be invested. There are many ways to give. Your estate planner can help with these and other options – all will make a lasting difference for SBISD students. Questions? Call us at 713.251.2381. Donate online: springbrancheducationfoundation.com





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Visit our website for a wealth of information about SBEF and our partnership with SBISD.

Learn who we are, what we do and how you can get involved. In addition to the latest news, you'll learn about our popular signature events where neighbors come together to raise funds for grants and scholarships.

