

# Quarterly Update

The Westlake Academy Foundation  
January 30, 2023



# WESTLAKE ACADEMY FOUNDATION

## Mission Statement

Our purpose is to provide financial support for Westlake Academy, an IB Continuum School where students become compassionate, life-long learners through an internationally-minded, balanced education that empowers students to contribute to our interconnected world.

*Financial statements, 990s, bylaws and current initiatives can be found on our website.*



[www.WestlakeAcademyFoundation.org](http://www.WestlakeAcademyFoundation.org)



### 2022-2023 Westlake Academy Foundation Board of Directors

*Back row (l to r):* Dr. Shelly Myers (Executive Director), Sean Shope, Rob Fitzgerald, Christine Ross, Meghan Dorr, Heather Kilgore

*Front row (l to r):* Lilly Jimenez, Julie Kelly (Dev. Assoc.), Dr. Ahu Primeaux, Patty Pinsonnault, Sharan Sankaranarayanan

*Not pictured:* Mike Colby, Tiffany Hernandez, Debbie Kraska



Westlake Academy Foundation



@WestlakeAcademyFoundation







# Blacksmith Annual Fund

Blacksmith Giving Day

It ALL starts with...

## Charter School Funding vs. ISDs



This \$8,617 represents just 51% of the Academy's total cost to educate each of our IB learners. For 2022-23, providing an IB education at WA costs \$16,750 per student. As a charter school, WA does not receive revenue from property tax. Property taxes stay with each student's zoned-for "home ISD".



Traditional ISDs, unlike charter schools, receive an average of 61% of their revenue from the State of Texas and 31% from local property taxes. For 2022-23, ISDs will receive 100% of their funding - an estimated \$12,459 - from State and local sources to educate their students.

Did you know it costs \$16,750 for a WA education?

### FUNDING SOURCES

\$8,617	STATE OF TEXAS per student
\$5,448	TOWN OF WESTLAKE per student
+ \$2,685	ACADEMY FAMILIES per student + CORPORATE MATCHES
-----	
\$16,750	per student for 2022-23

We need YOU to help move the needle to the TOP!

**Academy Families** - After WA receives both State and Town of Westlake funding, there is a gap of \$2,685 per student. Each WA family is asked to donate \$2,500 per student or their Individual Best gift to the Blacksmith Fund. These contributions along with corporate matching gifts fund shared resources used by each student.

WA Families

Town of Westlake Funding

State Funding

**Town of Westlake** - For 2022-23, the Town of Westlake contributes approx. \$5,448 per student toward the overall cost of a WA education. The Town pays the WA building debt, maintenance/repairs, and "central office" services supporting every student (e.g., HR, IT, Finance).

**State Funding** - For 2022-23, the Academy receives approx. \$8,617 per student from the State of Texas. This is 69% of the money given to ISDs and just 51% of the money needed to educate an IB student at WA.

# BLACKSMITH ANNUAL FUND



## Purpose

- Donation drive that provides financial support for the current school year's operations. Parents, grandparents, school leadership, faculty/staff, alumni, corporations and foundations are all invited to contribute annually to help fill the \$2,685/student funding gap. Requested donation of \$2,500/student or Individual Best gift.

## Campaign To-Date

- Currently at \$1.24M in gifts/pledges of \$1.1M goal (113% goal) supporting WA's 872 students (\$1,424 gift avg.)
- Of the 530 families, 346 (70.38%) have donated to support their 638 students (\$1,946 gift avg.); 38 of 67 new families (57%) have donated.
- Efforts to increase participation include Grade Captain calls/emails to non-donors and ongoing education for new families.



# BLACKSMITH ANNUAL FUND

## CAMPAIGN PREP & MARKETING



### POSTCARDS

- In-home mailer and carline postcards
  - Save the Date for BGD & How to Give along with fundraising goals
  - August calendar of events
- QR code to North Texas Giving Day site for immediate donation



### SOCIAL MEDIA

- Phase 1 – 9/1/22 – 9/22/22 – Daily Posts
- Phase 2 – 9/23 – 10/31/22 – Inspire additional gifts
- Content Strategy
  - 60% BGD promotion
  - 20% Grants in Action
  - 20% Donor Recognition



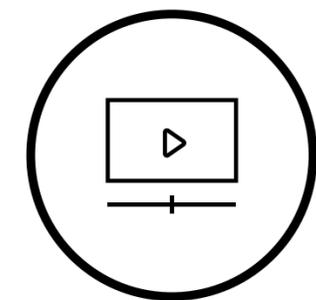
As reported in 9/15/22 Board Report



- 658 followers (gained 5 new)
- 1.1K people reached in the last 30 days.
- 329 accounts engaged
- 25 posts shared (8/15 - 9/13)
- Two stories



- 296 followers (gained 11 new)
- 939 accounts reached in the last 30 days.
- 96 accounts engaged (+50%)
- 25 posts shared (8/15 - 9/13)
- Two stories



### VIDEOS

- Blacksmith Giving Day promotional & thank you videos – Give your Individual Best
  - Campus slice of life to inspire giving
  - Updated for "Keep the Momentum"
- Mr. Wilson video message inspiring gifts
- Video 1 – Blacksmith Giving Day promo
- Video 2 – Mr. Wilson campus message
- Video 3 – Thank you donors!



BAF Solicitation Letter



SIGNAGE/POSTERS

- Campus yard signs displayed consecutively for message impact (20+ signs over campus)
- Carline signage, changed weekly
  - Giving Day countdown from Day 10
- Sock Banners - oversized, impact
  - two-sided indoor signage



FLYERS / MAILERS

- Blacksmith Annual Fund letter mailed to entire database
  - Infographic, parent quotes, Fundraising goals and how-to
  - QR code to WA Giving Day page
- Donor form
  - Details all the ways you can give
    - stock, auto draft, check, cc



DIGITAL MEDIA

- Constant Contact emails to our WAF email list, Communique messages, WAF website messaging
  - Save the Date, Donor How to Give, Donor Thank You
  - Links to Donor Forms, Donation Platform, FAQs, Infographic, Videos



# BLACKSMITH GIVING DAY

Let's celebrate our WA family of givers! With over \$1,179,000 donated on Blacksmith Giving Day, Westlake Academy was the #1 school and the #2 non-profit in monies raised in all of DFW!! GREAT JOB! and THANK YOU!

With 71% participation we are grateful for each and every one of our donors. Because of you an IB education at WA will remain exceptional.

**We thank you WA  
Blacksmith  
Annual Fund donors!**

% OF GOAL 100%



% FAMILIES IN 70.38%



*Thank you Donors!*  
We are grateful.



SCHOOLS			
	PARTICIPANT	DONORS	PAID
1	Westlake Academy Foundation	419	\$1,179,147
2	Cistercian Preparatory School	848	\$886,188
3	Trinity Christian Academy	376	\$669,618
4	Coram Deo Academy	957	\$430,122

**#1 School in DFW!**

# WAF Staff & Teacher Grants

## 2022 - 2023 School Year ~ Grants to Date





## How Westlake Academy Foundation Supports WA Teachers & Staff

*Putting donations into action!*

### EVERY YEAR...

- \$1,100 via 4 gift cards for classroom and workspace resources
- \$85,000 in grants available exclusively for teachers! *Think professional development experiences, teaching materials, classroom equipment, and more! See below for more details!*
- \$30,000 to give each WA coach & club advisor a 25% increase to current club/coach stipend
- \$22,000 for Teacher of the Year awards - *Two winners each receive a \$5,000 award (WAF adds \$3,500 to the HOC's \$1,500 award) and six finalist teachers each receive a \$2,500 award.*
- Complementary ticket to big Spring Gala - \$250 value

**Through these additional financial benefits, the Foundation board and donors are proud to recognize, support and take care of YOU! GO BLACKSMITHS!**

### ABOUT THOSE TEACHER GRANTS...

- This is where YOU come in!
- Each year, the Foundation provides \$85,000 minimum to fund teacher grant requests for love-to-have (or do) projects and trainings. We want to hear from you and help make ideas/wishes/dreams a reality!
- Here's a sample of grants funded from the last few years...**use this as inspiration for your grant requests!**
  - \$66,000 to attend IB Global Conference
  - \$13,000 for chemistry & physics supplies
  - \$560 for G6 math wipebooks
  - \$18,000 for K-5 STEM Lab supplies
  - \$1,200 for wireless microphones
  - \$3,150 for G3 Digital Pencils
  - \$6,855 to attend Nat. Council of Math Conference
  - \$5,000 to attend Fountas & Pinell Training
  - \$4,200 for Archery equipment
  - \$4,100 for French classroom resources
  - \$3,600 for SumBlox math manipulatives
  - \$1,000 for MYP Planners



## How Do I Apply for a Teacher Grant? (great question!)

### HAVE A GRANT IDEA? OR INSPIRATION?

Applying for a Foundation grant is super easy! Scan this QR code for the two question Grant Application!



*The WAF Board approves all grants. They meet the 3rd Thursday of each month. Be sure to have your signed request submitted one week prior to Dr. Shelly Myers.*

**The mission of the Foundation is to provide financial support for WA in its efforts to provide students with an internationally-minded education of the highest quality, so they are well-balanced and respectful life-long learners.**

### A WA FOUNDATION REFRESHER...

- In 2003, the Westlake Academy Foundation was created to serve as the fundraising arm of WA. That's a fancy way of saying "we raise money for whatever teachers and students need!"
- The Academy relies on Foundation funding for approximately 20% of its annual operating budget; this year the total is \$1.03M. Collectively, WAF initiatives raise over \$1.5M each year to support school operations, teacher salaries, academic programs, teacher training, upgraded technology, new equipment as well as the endowment.
- AND the most important thing to know about the Foundation is that the source of these donations is overwhelmingly our PARENTS. Westlake Academy would look very different without the generous annual contributions from our supportive families!

Contact Dr. S. Myers for more info!  
SMyer@westlakeacademy.org

**Staff Grant  
How-To Reminder  
"bookmark" Gifted  
in August**

WestlakeAcademyFoundation.org

# WAF STAFF & TEACHER FUNDING



## Grant Money Available

- Using spring Gala proceeds, the WAF provides at least \$75,000 annually for "Above & Beyond" grant requests for teachers & staff. WAF also oversees annual funding available from two of our endowment funds: \$10,000 for grants via the Gingy Quinn Teacher Fund, and \$2,500 for student travel awards via the Bradley Travel Scholarship.

## Donor-Designated Funds

- The Foundation currently manages six (6) funds totaling \$26,109 that are restricted for specific projects or initiatives, namely: dyslexia tutoring, student travel awards, drumline, performing arts, and the Sawyer Davidson PYP Science Lab.

## External Grants

- The Foundation applied for and received an \$80,000 grant from the M.R. and Evelyn Hudson Foundation to support these WA initiatives:
  - \$23,000 - Capturing Kids Hearts teacher/staff training
  - \$5,000 - Junior/Senior Prom
  - \$2,000 - Sadie Hawkins Dance
  - \$50,000 for 13 grade-level experiences or field trips

# WAF GRANTS

## 2022-2023 Monies Awarded To-Date

- Since August, the WA Foundation has granted \$49,120 to fund nine different grants for WA teachers. Additionally, another three grant requests totaling \$3,657 were funded through our Quinn Fund. Grant requests are also shared with the HOC for possible shared funding opportunities.
- Recipients each receive a “mini-check” to recognize and promote successful grant request.

## Aug-Dec 2022 Grants

- Chemistry Lab Equipment \$19,958 ~ Karen Smith
- Malmo University Student Teacher \$530 ~ Rod Harding
- Pout Pout Fish Traveling Theatre \$3,500 ~ Joanna Reynolds
- The Artist Outreach \$13,800 ~ Alison Schneider
- Jared Scott - Guest Speaker \$3,750 ~ Lisa Phillips
- G6 - G8 Science Equipment (\$10K from HOC) \$17,582~ Joanna Wolfe
- MYP Art Cabinets & Materials \$1,803 ~ Suzi New
- G6 - G12 Class Novels \$1,364 ~ Teri Watson
- Making Holiday Memories Team-Building \$490 ~ Jennifer Stockton



# Teacher Retention Efforts

## Baja Teacher Gift Cards

# TEACHER RETENTION EFFORTS

## \$250 Back-to-School



## \$500 Thanksgiving Break



## \$250 Winter Break



## EACH YEAR...

The Foundation is asked to raise dedicated funds to support the Academy's teacher retention efforts. Thanks to incredible donor generosity, WA teachers and staff receive four gift cards totaling \$1,100 throughout the year.

## TOTAL DONOR IMPACT...

Since August, the Foundation has distributed \$1,000 via three gift cards to each of our 106 teachers and staff members (\$106,000 total to date).

# WHAT DOES THE STAFF SAY?



I was beyond surprised when I received my first gift card. It is certainly not an easy task to raise funds for all educators that have an impact in the student's education, as well as hand deliver the gift to each person. I genuinely appreciate your time, detail, attentiveness and generosity.

**MYP TEACHER**



I'm new to WA. I'm also new to teaching and had no idea how much teachers spent on their kids and their classrooms. The gift card allowed me to buy much-needed book boxes, sports equipment, and other items the kids' needed.

**PYP TEACHER**



I am truly grateful beyond what words can adequately express. The generosity of the Westlake Academy families is overwhelming. I look forward to receiving the gift cards throughout the year. It allows me to do special things for my students and my team, as well as my classroom that I otherwise would not be able to do.

**DP TEACHER**



# WAF in Action

All-School, Community & Affiliate Support



# BEYOND FUNDRAISING



- First Day of School Rock Band
- Teacher Orientation Welcome gifts
- Back-to-School "Swag Sale" for Travel Awards
- Roanoke Veterans Day Parade
- HOC Trunk or Treat
- Appreciation gifts for shared services teams
- Admin on duty for athletics, as needed
- School Tours for current & prospective Westlake families



# IT'S WHAT WE DO.

Taking care of students and teachers, making sure they have all that they need, is what motivates the volunteers and staff of the WA Foundation. To share the many expressions of thanks and appreciation and to further show donors the impact of their giving, we facilitated a campus-wide gratitude campaign. Our most recent "Gallery of Gratitude" can be viewed on our website!



# Save the DATE!

*Two events combined, one big FUNdraiser!*

## **WA Gala 2023**

### **Transition & Early Marketing**

G A L A 2 0 2 3

# April 29, 2023



**Thank you  
for giving.**

WESTLAKE  
ACADEMY

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for giving.**

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