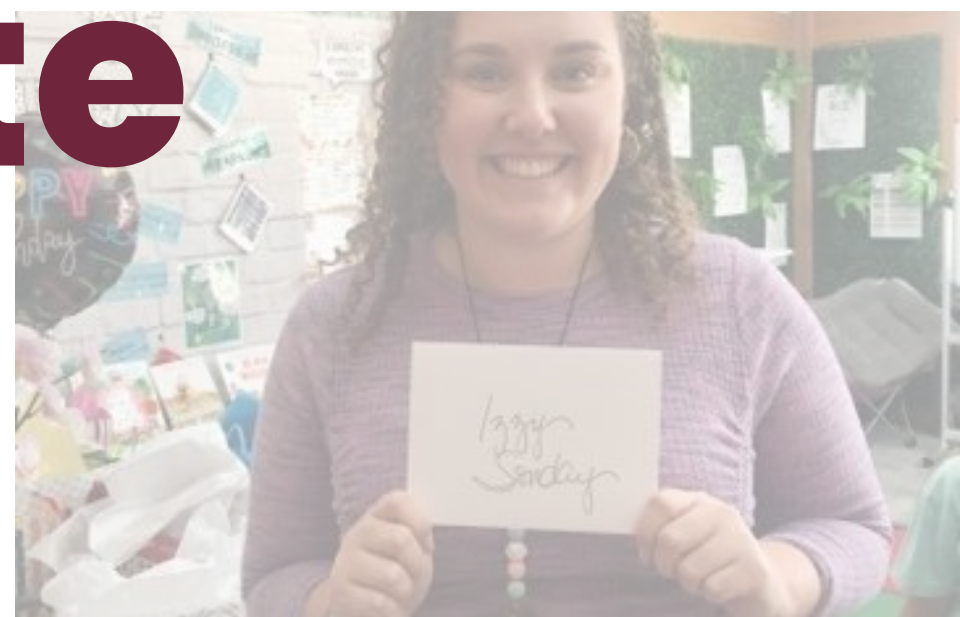
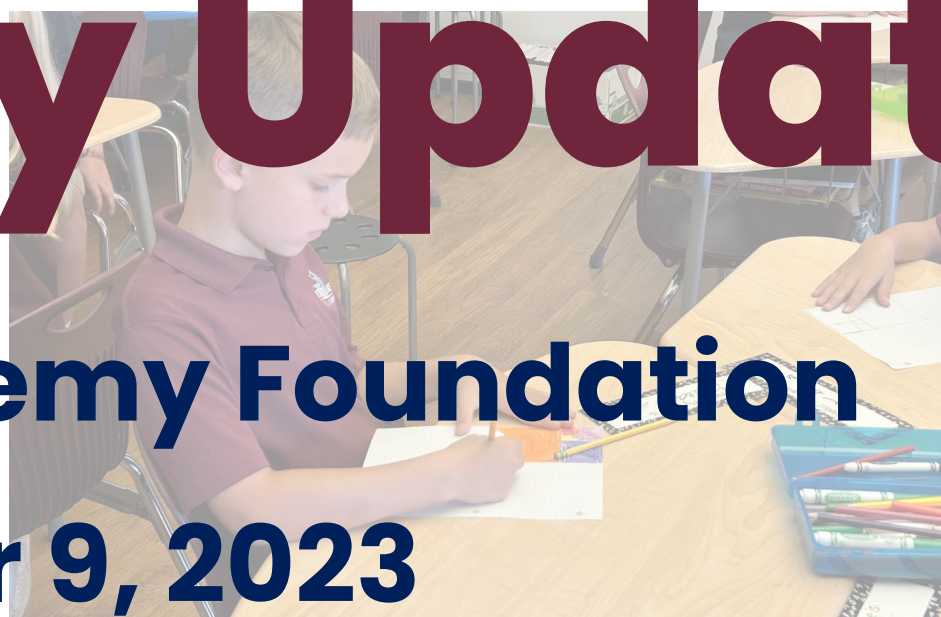
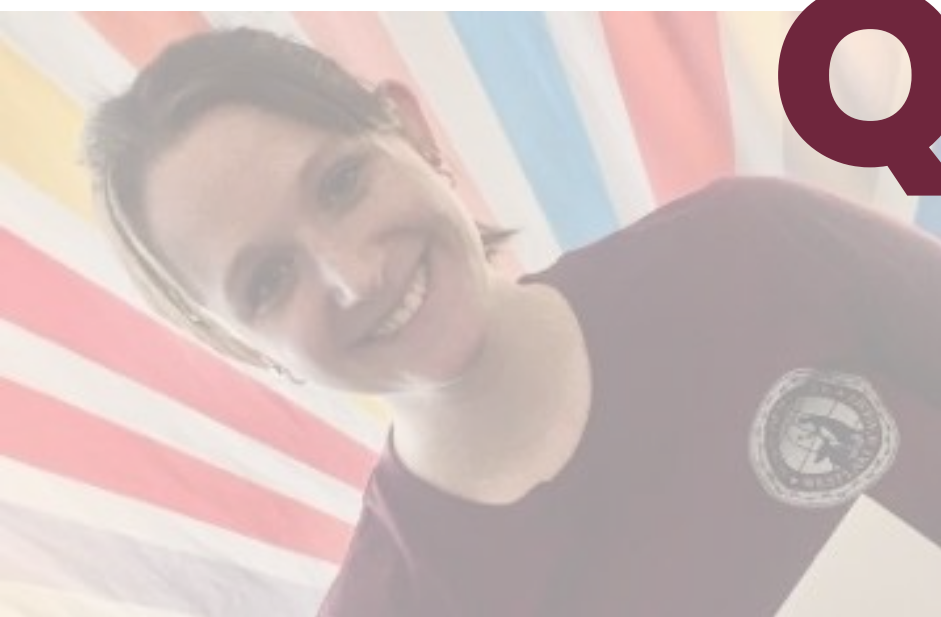




# Quarterly Update



**Westlake Academy Foundation**  
**October 9, 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, investment policy, bylaws and current initiatives can be found on our website.*



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



### 2023-2024 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 (retired), Julie Kelly (Dev. Assoc.), Dr. Ahu Primeaux, Patty Pinsonnault, Sharan Sankaranarayanan

*Not pictured:* Mike Colby, Debbie Kraska



Westlake Academy Foundation



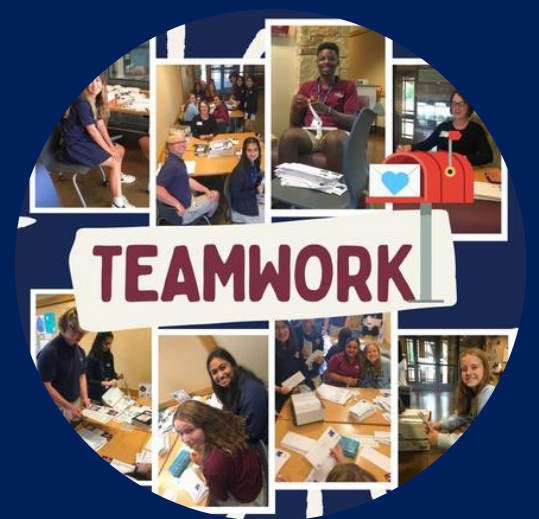
@WestlakeAcademyFoundation



# WAF ACTIVITY

August 1 – October 9, 2023

- Blacksmith Annual Fund close-out FY23
- Blacksmith campaign kick-off and Giving Day FY24
- “Gift Cards for Classrooms” \$100 Back-to-School
- WAF Committee Meetings
- Grantmaking
- Grant management
- Back-to-School events





# Blacksmith Annual Fund

## FY23 Year-End & FY24 Kick-Off

### Tips to Do Your Best

- Take your time and **do not rush**.
- Read each question and answer choice **carefully**.
- If you get a question you have not learned yet, **just do your best**.
- For Math—Use **pencil and paper** to work out a problem.
- For Reading—Read each passage carefully and **reread** if necessary.
- Answer

Thank You  
WESTLAKE FAMILY  
OF GIVERS!  
YOU'RE THE  
BEST!

GET UP & GIVE, WESTLAKE!  
BLACKSMITH  
GIVING  
DAY  
9.21.23

NORTH TEXAS GIVING DAY  
THANK  
YOU  
NorthTexasGivingDay.org

9  
Days to GO!

*It ALL starts with...*

## Charter School Funding vs. ISDs



**WESTLAKE ACADEMY RECEIVES \$8,775 FROM THE STATE OF TEXAS**

This \$8,775 represents just **45%** of the Academy's total cost to educate each of our IB learners. For 2023-24, **providing an IB education at WA costs \$19,658 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".



**ISDs FUNDED 100% BY STATE OF TEXAS AND LOCAL PROPERTY TAXES**

Traditional ISDs, unlike charter schools, **receive an average of 35%** of their revenue from the State of Texas and **65%** from local property taxes. For 2023-24, ISDs will receive **100%** of their funding - an estimated \$13,290 - from **State and local sources** to educate their students.

**Did you know it costs \$19,658 for a WA education?**

### FUNDING SOURCES

<b>\$8,775</b>	STATE OF TEXAS <i>per student</i>
<b>\$ 845</b>	WESTLAKE ACADEMY <i>per student</i>
<b>\$6,932</b>	TOWN OF WESTLAKE <i>per student</i>
<b>+ \$3,106</b>	ACADEMY FAMILIES <i>per student</i> + CORPORATE MATCHES
-----	
<b>\$19,658</b>	<i>per student for 2023-24</i>

**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 **\$3,106 per student.** Each WA family is asked to donate a minimum of \$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 every student.

WA Families

Town of Westlake Funding

State Funding

**Town of Westlake** - For 2023-24, the Town of Westlake contributes approx. **\$6,932 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).

# BLACKSMITH ANNUAL FUND



## FY23 Final Stats

- Provided **\$1,200,056 (109% goal)** to the Academy to support '22-23 school operations.
- Donor families gave an average of \$1,950/student. When spread out to cover all 865 students, gift average = \$1,443/student.
- **71% parents** (375/527) donated for their 640 students.
- **57% new families** (40/70) contributed to BAF.
- As reminder, funding gap = \$2,685/student; requested donation of \$2,500/student or family's best gift
- **476 gifts** received from parents, grandparents, faculty/staff, alumni, corporations and foundations

## FY24 Campaign To-Date

- Thanks to **375** generous donors, we were the #1 school for third straight year with **\$1,051,565** raised on Blacksmith Giving Day.
- As of 10/3, gifts & pledges = **\$1,106,800**
- Current averages: donor families = \$1,991/student; spread out to support all 880 students = \$1,258/student.
- **63% families** (337/536) have donated for their 556 students.
- **55.6% new families** (45/81) have given so far.
- Grade Captains initiating Phase 2 – **Operation Finish Line!**

# BLACKSMITH GIVING DAY

Broad overview of marketing strategies to engage, inspire, educate and motivate!

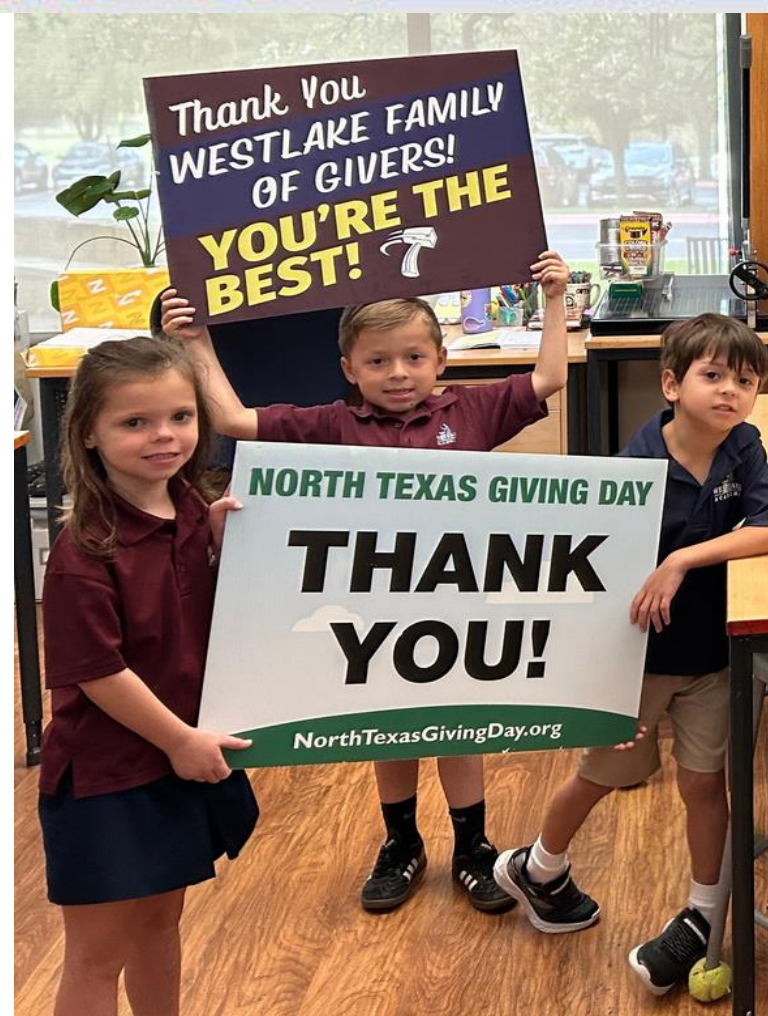
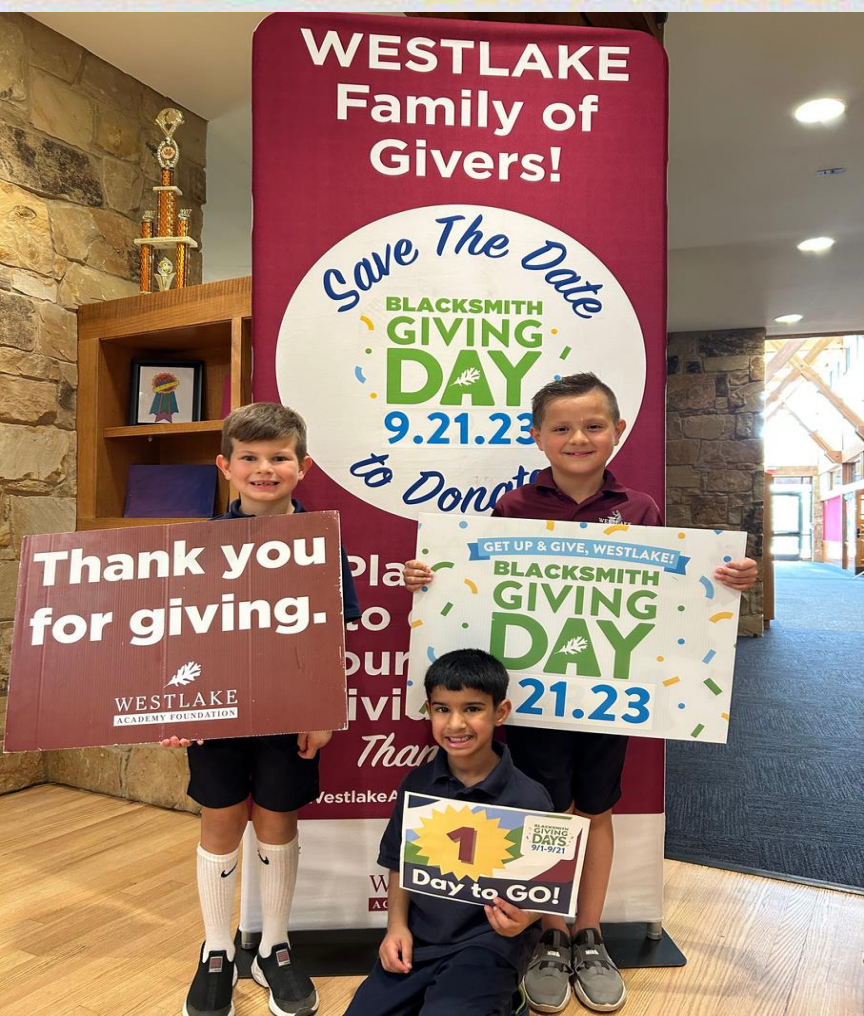
- Campus signage
- Postcard handout with magnet and QR code
- Mailed solicitation letter
- WA & Foundation websites
- Foundation eBlasts
- Weekly Communique
- Grade Captain emails
- Foundation social media
- Grade-level social media
- Student sign-wavers
- Videos



Some social media stats...

- FB - 732 followers, IG - 380 followers
- 100+ posts re. Blacksmith Giving Day Initiatives
- FB - 3k accounts reached in last 90 days, 1.4K accounts engaged
- IG - 604 accounts reached in last 90 days, 807 accounts engaged

Shout out to WA and Town of Westlake for sharing our posts, videos and success! Team Westlake #1!!!



# 20th Annual Blacksmith Fund Drive

September 2023

Dear Westlake Academy Parents & Friends:

This is such a wonderful time to be a Blacksmith! Campus is buzzing with excitement and pride as we celebrate the 20th Anniversary of Westlake Academy. It is in this celebratory spirit that I am writing today to invite you to join me in supporting our exceptional school through the 2023-24 Blacksmith Annual Fund.

Westlake Academy continues to thrive as one of the most prestigious public Charter schools in the country. We are consistently ranked in the Top 1% of high schools nationally. WA seniors continue to outperform the world, 80% of the Class of 2023 received their IB diplomas compared to the 79% world average. The Academy enjoys a 100% graduation rate and students enter their best-fit college or university with a significant credit, thanks to their performance on IB and AP exams. We have been consistently accepted to the Top 50 universities and couldn't be more proud of our WA alumni!

Despite our students' impressive academic record each year, we are still underfunded by the State of Texas simply because we're a public school. This year, traditional ISDs will receive \$13,290 per student from the State and local property taxes. WA will receive \$8,775 from the State and \$0 from property taxes. That's a \$4,515 less per student than what we need to provide a quality education.

This gap is further widened by the very nature of an IB education. More for all that the Academy does and wants for our students. In the 2023-24 academic year, the actual cost to educate an IB student at Westlake Academy is \$19,658.

As members of the Westlake Academy Family, we all share the same goal: to help bridge this funding shortfall. It's an important role for us to come together, contribute toward the share for every student, and help every way possible to support teachers. We ask each family to join in and donate a minimum of \$2,500 per student per year as their contribution to the Blacksmith Annual Fund, which is the single largest source of funding for the Academy.

Every donation absolutely counts.

Our biggest fundraising initiative for the Blacksmith Fund North Texas Giving Day on September 21, 2023. Now through Thursday the 21st, folks across DFW will donate to their state's largest single day of giving! We call it "Blacksmith Giving Day." We invite you to join our community, inspire participation, and support our teachers. Throughout the day, we watch the Academy with immense gratitude at the level of caring and support that our Blacksmiths!

Early giving is open now! Visit [WestlakeAcademyFoundation.org](http://WestlakeAcademyFoundation.org) on the big "Donate Here" button or scan the QR code to get started.

WATCH YOUR MAILBOX!



"Why does our family donate toward an Academy education when public school is 'free'? It is more important than ever to provide our children with the best education possible. Through the Blacksmith Fund, we invest in our children being at WA because WA is invested in our children."

-PYP Parents

"Once we visited Westlake Academy, we made a commitment to sacrifice in any way to support our child's education. Even though we aren't charged tuition, our family views it as our primary Blacksmith donation is a no-brainer for us."

-MYP/DP Parents



# Principled

GET UP & GIVE, WESTLAKE!

**BLACKSMITH GIVING DAYS** 9/1-9/21

COUNT US IN!

OVER 500 WA FAMILIES

ANNUAL FUND GIVING DAY!

\$1.25 MILLION GOAL

875 WA STUDENTS

- Read through our giving options to make your family's generous Blacksmith donation! If you're committing to donate a future gift, please just let us know your gift amount, method and expected contribution date. Whether you give now or pledge to give later, whatever gift option works best for YOU works great for WA! Thank you!
- To keep WA exceptional, we ask each family to contribute a minimum of \$2,500/student. This year's funding gap is \$3,106/student.
- CHECK**
    - Great method, no fees!
    - Mail to WAF or drop off in front office by 9/21
    - Make payable to Westlake Academy Foundation
  - CREDIT CARD**
    - Use the card that gives you the most points/miles!
    - Donate directly thru the Foundation's website or thru North Texas Giving Day site
    - Pay in full or set up monthly recurring payments
  - ACH/BANK DRAFT**
    - Pay in full or set up monthly recurring payments
  - STOCK**
    - Appreciated Stock, Bond or other Security gifted to Westlake Academy Foundation
    - Email Shelly in WAF office, indicate below account info as well as # of shares and name of stock
    - RBC Wealth Mgmt. DTC #0235; Account #321-75210; contact - susanne.ciffl@rbc.com
  - WIRE TRANSFER**
    - Contact the Foundation office to initiate donation process.
  - CORPORATE MATCHING GIFT**
    - Connect with your HR Dept. to see if your company will match part or all of your family's donation!
    - Let us know if your gift + match will come directly from your employer - OR - if we should be on the lookout for an online or paper form to verify your donation.
- Please complete reverse side and return by September 21 for Blacksmith Giving Day! Send or drop off to: Westlake Academy Foundation, 2600 J.T. Ottinger Road, Westlake, TX 76262

We are... **ON TOP!**

BLACKSMITH GIVING DAY 9.21.23

PARTICIPANT	SCHOOLS	DONORS	RAISED
1	Westlake Academy Foundation	262	\$784,616
2	Cistercian Preparatory School	591	\$624,547
3	Lumin Education	54	\$361,148
4	Trinity Christian Academy	153	\$304,261

Keep it up!

DONATE NOW!

meet AHU! meet SHARAN! meet JULIE! meet TIFFAN! meet FARIBA! meet MEGHAN! meet JOHN! meet LARISS! meet PATTY! meet TIFFAN! meet JENNIFER!

Grade Captain - G3, G1, G7, G4 & G8, G6, G1, G9, G12, G2

TEAMWORK

# Happy 20th Anniversary Westlake Academy!

Scan to support WA!

BLACKSMITH GIVING DAYS 9/1-9/21

Ugh! You! You!

BLACKSMITH GIVING DAYS 9/1-9/21

You are amazing!

ACADEMY ADVANTAGE

Family of Givers!

Save The Date BLACKSMITH GIVING DAY 9.21.23 To Donate!

Plan NOW to donate your family's Individual Best! Thank you!

WESTLAKE ACADEMY FOUNDATION

Early Giving NOW thru 9/20/23

Blacksmith Giving Day! 9/21/23

All donations earn BONUS \$ for WA!

THIS IS WHO WE GIVE FOR...

THIS IS WHO WE GIVE FOR...

THIS IS WHO WE GIVE FOR...

THANK YOU to these families for their Blacksmith Giving Day donation!

Scan & cheer here!

BLACKSMITH GIVING DAYS 9/1-9/21

Still need to get into the Giving Day game? Scan & Give here! Now - 9.21.23

# Countdown to Giving Day!

DONATE NOW!

# BLACKSMITH GIVING DAY!

# 9.21.23

10 Days to GO!

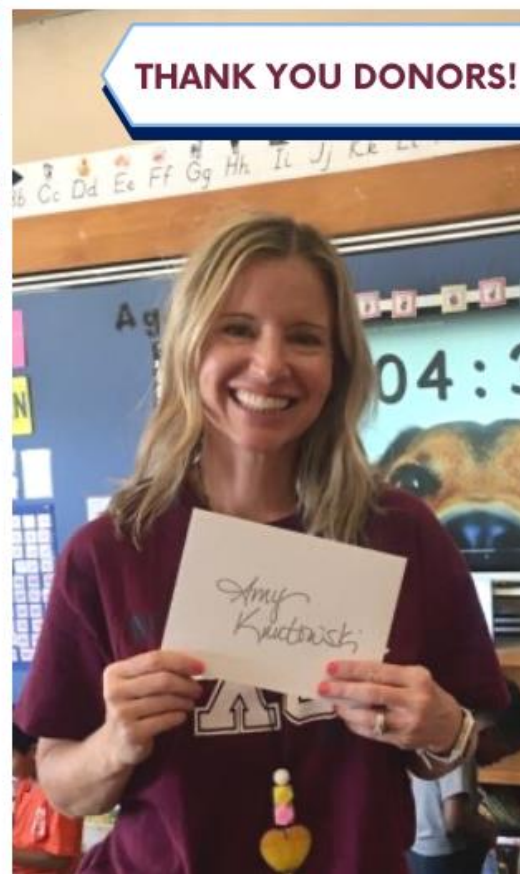
# ALL families needed to raise \$1.25M!



# COMMITTEE WORK

## Development Committee

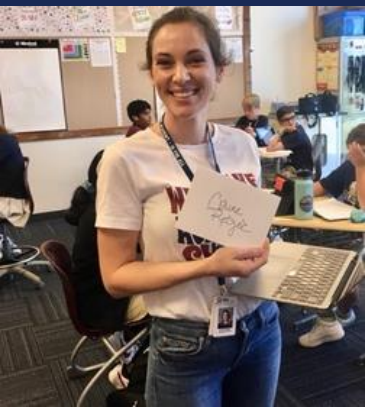
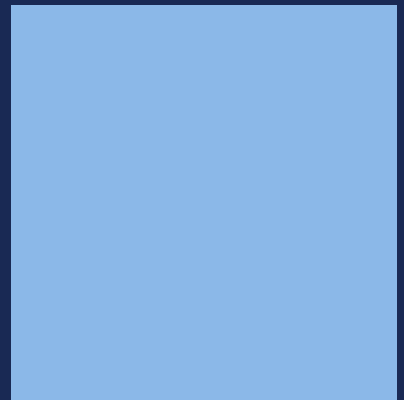
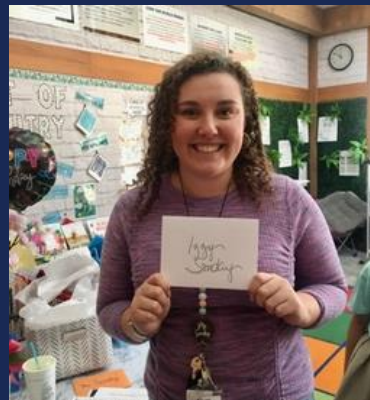
- Reviewing websites and print samples in advance of launching an **Endowment Fund initiative** to commemorate the 20<sup>th</sup> Anniversary.
- Crafting proposed fund levels, fund types, pledge payment terms, gift agreements, etc.



## Investment Committee

- Exploring various WAF resources that could serve as sustainable funding source for the annual **Gift Cards for Classroom** initiative.
- The Instructional Leadership Team (ILT) will be providing several options with varying cost totals to assist discussion and need.
- In the meantime, WAF used \$10,862 in carryover gift card-designated donations to provide **\$100 "welcome back" gift cards** to 110 faculty, staff and leadership members (\$20,194 remaining)
- The ILT confirmed they would like to continue the Gift Card initiative as part of their efforts to retain and appreciate faculty and staff.

# GIFTS in Action



## Gala Committee

- Working theme = **Platinum Gala** to celebrate 20<sup>th</sup> Anniversary
- Working to confirm spring date & venue
- Considering scaling back silent auction to include only student art and WA teacher experiences
- New idea = dept. projects as auction packages that guests can directly donate to (e.g., library, theatre, science, athletics, fine arts)



# Grantmaking & Grant Management

Sept. 1, 2023 to date





MEETING DATE	9/28
MONIES GRANTED	\$12,831
GRANT NAME	Biology & ESS Equipment
IMPACT	Materials for hands-on lab investigations for over 200



# GRANTMAKING AND MGMT.



## Monthly Discretionary Grants

- Sept. 28 – Approved **\$12,831** for “**Biology & ESS Equipment**” to provide materials for hands-on lab investigations for over 200 G9, 11 and 12 students.



## Donor-Designated Funds

- Connecting with staff to advise available funds and process for utilizing **seven (7) restricted funds totaling \$52,390.**
- These funds are designated to support: dyslexia tutoring, student travel awards, drumline, performing arts, athletics, club activities, and the Sawyer Davidson PYP Science Lab.

## External Grants

- Working with teachers and admin to facilitate usage of **Hudson Foundation** grants spanning 2 years with **\$203,000** remaining.
- Hudson “mini-grants” include funds for teacher orientation, back-to-school activities, K-G12 class experiences, prof. development, Jr-Sr Prom, Cheer Team, and 20<sup>th</sup> Anniversary events
- ILT will advise project to best utilize **\$25,000** grant from Bryce Trust at **JPMorgan Chase.**
- Original request = \$146K for PYP classroom furniture, laser projector in MPH and cabinets for common spaces.





# WAF in Action

All-School, Community & Affiliate Support



# BEYOND FUNDRAISING



- Provided new teacher & staff welcome gifts
- Gifted each senior with Class of 2024 yard sign
- Connected with new parents during PYP and Secondary onboarding sessions
- Hosted Back-to-School "Swag Sale" to boost general Student Travel Award fund
- Participated in HOC New Parent Breakfast
- Organized Donation Station at Town of Westlake Fall Clean-Up Day



# COMING SOON!

- Launching "Student Advisory Council" initiative to work with the WAF Board
- Participating in HOC Trunk or Treat (Oct. 21)
- Coordinating WA entry in Roanoke Veterans Day Parade (Nov. 11)
- Delivering appreciation gifts to WA support and shared services teams (Dec. 14-15)





**Thank you  
for giving.**

WESTLAKE  
ACADEMY

**Thank you  
for giving.**

WESTLAKE  
ACADEMY FOUNDATION

**Thank you  
for giving.**

WESTLAKE  
ACADEMY FOUNDATION