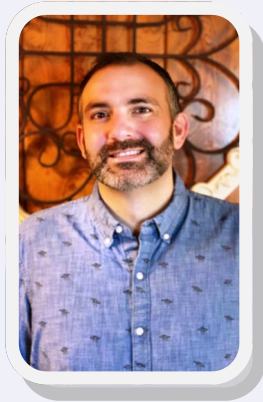


LIBERTY ISD EDUCATION FOUNDATION

ANNUAL REPORT 2020

JANUARY 27, 2020

A letter from our President...



BRANDON DAVIS

Dear Friend of the Liberty ISD Education Foundation,

My name is Brandon Davis, and I am currently the President of the Liberty ISD Education Foundation and a proud graduate of Liberty High School. As you know, Liberty ISD provides a first-class education for all of its

students, with programs that enable them to be successful in college, trade school, the military or the workplace upon leaving school.

The Liberty ISD Education Foundation is an independent, non-profit 501 (c)(3) organization whose mission is to help Liberty ISD students by funding classroom grants for materials and programs outside the scope of Liberty ISD's normal operating budget. Since its inception in 2007, the Foundation has awarded over \$213,000 in grants to provide innovative programs and materials in the classroom at Liberty ISD. Last year, thanks to the generosity of our donors, awards totaled \$14,594.

The Foundation raises money by hosting fundraising events, such as the Liberty Freedom Ride and the annual Foundation

Gala, and through donation drives in our local community. These fundraisers and donations to the Foundation help us award more grants and improve the innovative programs and materials offered to our students. All donations to the Foundation are tax-exempt.

We believe that education is the cornerstone of our communities and our country. It is imperative that, as our community and schools grow, we continue to support our students and give them every opportunity possible to be successful. With your help and your continued giving, we can make a difference in our community and in our country.

Sincerely,
Brandon Davis
President

Officers

Brandon Davis– President
Keri Elliott- VP of Admin.
Shannon Gardner - Treasurer
Margaret Gardzina - Lifetime
Cody Abshier - Superintendent

Directors

Leslie Herndon
Fallon Kay
Laura Hernandez
Sharon Brown
Barbie Kelly
Mychal English
Rick Vinson
Ross Norwood

Learn about the Liberty ISD Education Foundation

About Us

Established in 2007, with the aid of the Miles Foundation, the Liberty ISD Education Foundation is an independent, non-profit 501(c)(3) organization whose mission is to enhance the educational experiences of the Liberty public schools by fostering community support above and beyond what is provided by the district's normal operating budget.

The Foundation works closely with the school system but is completely

independent. Our Board of Directors consists of residents, retired educators and business people whose commitment to public education in Liberty is strong and in the best interest of every child in the school system.

Our Values

The Liberty ISD Education Foundation values enrichment opportunities, inventive teaching and academic exploration as we strive to promote the empowerment of teachers as an essential dimension of encouraging the

academic success of students.

The Vision of the Foundation

We wish to create a partnership with the community to support students in pursuit of academic excellence. We firmly believe that investing in our students today will return excellent leadership tomorrow.

Our Mission and Purpose

The Mission of the Liberty ISD Education Foundation

is to generate and distribute resources to the Liberty ISD to enrich, maintain, and expand programs needed to ensure that each student reaches his or her full potential.

Striving to promote excellence in teaching and enhanced educational experiences for our students, the Liberty ISD Education Foundation cultivates joint public-private partnerships that will provide teachers with community support and access to additional financial resources.



Bruce Wright
Executive Director
Liberty ISD Edu. Foundation

SOCIAL MEDIA

REACH



2014	271
2015	439
2016	617
2017	715
2018	793
2019	877

Grants

2019's ten grants totaled \$14,594! Since the inception of the Foundation in 2007, seventy eight grants totaling \$213,213.58 have been given to teachers and students and campus projects at LISD campuses.

2019 INNOVATIVE TEACHING GRANTS

Digital LCD tablets for cursive writing – Joanne Knepper \$488

This grant is funded in part by *The Dahlia McManus Endowment and The Laura Jane Hartel Endowment.*

Coordinator's Summary for 2019

Making A Difference – Oriana Cedeño \$800

This grant is funded in part by *The JoBeth Willoughby Teaching Grant and The Miles Foundation*

Math Games – Agnes Gobert \$460

This grant is funded in part by *The CW and Aggie Castle Family Endowment and The JoAnn McGuire Endowment.*

Math (literature) books for the classroom – Agnes Gobert \$385

This grant is funded in part by *The C.A. (Abe) Miles Endowment, The Liberty County Farm Bureau Endowment*

The Power of Puppets: Reader's Theatre – Jenny Callaway \$1094

by *The Mildred Arnold Endowment, The Liberty Lions Club, and The Nora Miles Endowment.*

Spectroscopy – Elisha Lemelle \$1071

This grant is funded by *The Jeffrey Family Teaching Endowment, The Baxter W. Dunagan, Sr. Endowment, The Norman and Brenda Dykes Endowment*

MakersSpace – Barbara Ross, Haley Regian, Tina Box \$2052

The Vara Martin Daniel Teaching Grant for the Fine Arts and The First Liberty National Bank Endowment fund this grant.

Creating an Autism Friendly Campus – Andrea Hagan, Charlotte Greineisen \$2134

This grant is funded by and the M.J. Joe Leonard Endowment and the Miles Foundation.

Parent Lending Library – Ana Samano \$654

This grant is funded by The Dr. Reese and Sara Brown Endowment

2019 SPECIAL GRANTS STEM Center Engineering Grant – Alex Morrison \$5,457

This grant is funded by the Dawn Forticq Endowment

Fundraising

The **4th Liberty Freedom Ride** was held involving 80 participants, over 75 volunteers but was severely affected by weather. LFR cleared \$9,601.70 . (expenses were \$2,571.70)

Handbag Raffle income was \$11,500. Although only 115 of 500 tickets were sold, the final numbers reveal a profit of \$8,069.90.

LISD Payroll Deduction Program continues with \$3,311 last year.

Other fundraising efforts added this year included a #GivingTuesday Facebook effort & Amazon.Smile.com.

Recognitions

The Foundation continues its

recognition of the Top 10 % of LISD graduating seniors in May.

Personnel

We lost Alaina Arnold, Jessika Kirkland, David Rodriguez and Mitzi Kline this year but added Sharon Brown, Barbie Kelly, Mychal English, Ross Norwood and Rick Vinson.

Huntington Ingalls Industries Grant

In Jan, Laura Hernandez's efforts paid off with a \$10,000 grant from her company in her honor.

Dawn Forticq Grant

In Dec, the LISD Education Foundation received a check from the Dawn Forticq Memorial Scholarship in the amount of \$97,900! We expect another similar check in the next days. The trust was looking for a new home and Brandon Davis told them about the Foundation and they have decided to move the entire trust to the Foundation and asked that we give an annual grant in her memory.

At this time, another group with similar trust type issues is considering donating their endowment too. These are income streams not even considered at the beginning of last year.

Plan for 2020

Strategic Planning

Our calendar includes a work flow, showing what we

Coordinator's Summary cont.

should be doing at what point in the year. In developing the calendar, I considered other major events and fundraisers in Liberty avoiding what might be major conflicts. Strategic Planning session is planned for October of 2020.

Finance/Fundraising

A return to a community campaign/traditional fundraising program is in order for 2020. The directors have been planning a mail out and contact strategy set to begin in January of 2020.

Online donations

We continue to search for a more accepted way to allow people to donate using credit cards. Whether using BidPal or other like online fundraising software, the Foundation needs an online

module to reach the younger group who don't write checks.



**LIBERTY ISD EDUCATION FOUNDATION
CURRENT SPONSORS JAN. 2020**

Distinguished Partner

Dawn Forticq Memorial
Miles Foundation

Platinum Partner

Huntington Ingalls Industries - Technical
Solutions Division
Brandon & Gradee Davis

Gold Partners

Smart Oilfield Services LLC
Wingfield Concrete Construction
Leslie & Mark Herndon – Edward Jones
QP Services
Blake Oil and Gas Corporation
Margaret Gardzina

Silver Partners

Anne and Robert Tucker Jr
LHS Class of 1969 reunion
Carl and Laura Pickett
Liberty Medical Surgical Clinic – Steven
Ellerbe D.O.
Liberty Dayton Regional Medical Center
Kathy Gail Wilson
Smart Materials

Bronze Partners

Allsurance Agency – Todd & Alaina Arnold
Shannon & Mark Gardner
Clawson's Printing
Patty Watson
Nolan Greak
Colette & Michael Leonard
Greak Insurance
Trivium Club of Liberty
Lance & Lindsay Lawrence – Edward
Jones
Ed & Sandy Pickett
First Liberty National Bank FLNB
Logan Pickett
The Crawfish Place
Jason and Fallon Kay
Jerry and Mitzi Kline
Kelly's AC and Heating
Kristi and Cody Abshier

Friends

Lloyd & Tammy Pierce
Bobby & Masha Rader
June & Paul Damek
Gary Willoughby
Joan Jeffrey
Stephen & Debbie Dugger
Beverly Davis
BJ Ford
Darell & Julie Pruet
JAX
Catherine Graham
Cathy Harbour
Cynthia Nelson
D and B Guess
Donna Greak
Douglas and Heide Shanda
Farrah Harper
Gary and Pamela Feist
Gretchen Braunstein
Jan Molder
Lamar and Neal Iverson
Liberty Lions Club
Liton Petroleum Consultants
Malcolm and Kelly Goudeau Jr
Mary Buchanan
Melinda St. Clair
Michael & Shannon Bavousett
Molly Monse
Mrs. JC Zbrank
Merle Hunsaker
Robert P. Jones
Ron and Barbara Norwood
Sherry Boatman
Vivienne Kirkland
William & Tammy Spijkerman
Christie Bean
Greg and Tina Box
Kickstand Bikes
Triple H Dumpster Service
Tailwind Bicycles
KSHN.com
The City of Liberty
Liberty Lions Club
John Johnson
Brookshire Brothers
Tracy Williams – State Farm Ins.

Jones Automotive Services

David W Arnold DDS
David and Margo Taylor
Donna Eckols
Melissa Barnett
Madeline Bell
Jody Brock
Peggy Castilow
Wanda Clay
Jill Cornell
Brooke Culton
Stephanie DeBerry
Trudie Dewey
Carissa Drake
Emily Edwards
Erica Erskins
Theresa Fitzpatrick
Julianne Forse
Tamara Frazier
Tonya Freeman
Megan Fregia
Fulton Fry
Josefa Garcia
Amanda George
JoAnn Gilliland
Charlotte Greineisen
Randy Gunter
Julie Hebert
Odelia Hebert
Lisa Heim
Kim Hutcheson
Yvonne Lawrence
Vanessa Lemons
Julie Mangum
Lindsay Matlock
Kelli Mikulec
Alex Morrison
Carlene Patton
Alvaro Romo
Maria Sanchez
Jennifer Scroggins
James Simmons
Jackie Smith
Jane Smith
Leah Smith
Rhonda Smith
Jessica Spickard
Gale Taylor
Penny Taylor
Dustin Vollert
Kristin Wright
Chris Wulff

At a Glance

	2014	2015	2016	2017	2018	2019
Facebook pg. "Likes"	271	439	617	715	793	877
Key Actions & Events	Beatles Concert event Added Fb page Added website Largest Grant total given out \$40,736	Payroll Deduction began Consultant Leslie Annen Bylaws changes	2 D and D events Change investment strategy to slightly more aggressive Added office space donated by Brandon Davis Added PO Box 1st LFR	M.J. Joe Leonard Grant started 2 nd LFR w/ 2 Mile Social ride added D and D cancelled due to Hurricane Harvey	Restart Alumni Assoc. Smile.amazon and #GivingTuesday Strategic Planning with Executive Comm. Handbag Raffle Fundraiser Largest Grant Application participation	4th LFR event, Revival of D&D event New coordinated mailout strategy for fundraising. Strategic planning moved to October Largest donor participation
Donations & Sponsors	Pete Willoughby Century club donation Miles Foundation Grant	Strike Grant	QP Enterprises Sponsorship	LCDC sponsorship for LFR 2	Miles Foundation Grant	Huntington Ingalls Industries Grant, Forticq Grant Mearns Grant
Grants	\$40,736	\$11,361	\$10,806	\$7,686	\$16,178	\$14,594
Total Acct Value	\$452,373	\$418,288	\$474,213	\$546,113	\$557,835	\$737,447

Liberty ISD Education Foundation Financial Summary (Dec 31, 2019)

	12/31/15	12/31/16	12/31/17	12/31/18	12/31/19
TOTAL Bank Accounts	44,779.64	47,533.45	53,185.87	102,993.58	161,930.58
TOTAL Investment Accounts	373,509.04	426,680.14	492,927.83	454,901.58	575,517.07
OVERALL TOTAL	418,288.68	474,213.59	546,113.70	557,835.16	737,447.65

Foundation Cash Flow 2018 and 2019

Cash Flow
1/1/2018 through 12/31/2019

Category	1/1/2018- 12/31/2018	1/1/2019- 12/31/2019	OVERALL TOTAL
INFLOWS			
Uncategorized	0.00	0.00	0.00
Alumni Association Income	4,407.64	0.00	4,407.64
Donation	58,904.82	111,768.29	170,673.11
Dahlia McManus Endowment	1,450.00	305.00	1,755.00
Jo Beth Willoughby Endowment	200.00	100.00	300.00
Joe Leonard Endowment	100.00	3,230.00	3,330.00
LISD Payroll Donation	3,684.00	3,311.00	6,995.00
TOTAL Donation	64,338.82	118,714.29	183,053.11
Interest Income	88.67	218.10	306.77
Liberty Freedom Ride Registration	3,675.00	2,873.40	6,548.40
Liberty Freedom Ride Sponsor	6,600.00	9,800.00	16,400.00
Purse Fundraiser	8,300.00	3,600.00	11,900.00
TOTAL INFLOWS	87,410.13	135,205.79	222,615.92
OUTFLOWS			
2018 Grant Award	748.20	0.00	748.20
Advertising	244.14	200.00	444.14
Alumni Association Expenses	55.00	0.00	55.00
Auto			
Gas	37.76	0.00	37.76
TOTAL Auto	37.76	0.00	37.76
Bank Charge	12.00	12.00	24.00
Board Meeting Expenses	142.87	291.20	434.07
Community Events	50.00	90.25	140.25
Contract Work - Coordinator	15,825.00	15,900.00	31,725.00
Dining	117.61	0.00	117.61
Flowers	24.89	0.00	24.89
Grant Committee Expenses	42.54	62.79	105.33
Grant Expenses	13,197.08	12,768.66	25,965.74
Grant Notifications	274.24	0.00	274.24
Liberty Freedom Ride Expenses	3,931.47	2,621.70	6,553.17
Office Supplies	297.09	78.52	375.61
Post Office Box	116.00	120.00	236.00
Postage and Delivery	103.75	55.00	158.75
Prof and Legal Fees	1,245.00	1,275.00	2,520.00
Purse Fundraiser Expense	1,547.78	2,282.32	3,830.10
TOTAL OUTFLOWS	38,012.42	35,757.44	73,769.86
OVERALL TOTAL	49,397.71	99,448.35	148,846.06

Foundation Planning Calendar 2020

**LIBERTY ISD
EDUCATION FOUNDATION**

PO Box 10437
1517 Trinity Str.
Liberty, TX 77575

Phone: 936-641-0367
E-mail: brucewright058@gmail.com

*"WE BELIEVE THE
FOUNDATION HELPS
BUILD BETTER CITIZENS
THROUGH ITS GRANT
PROGRAM. INVESTING IN
LIBERTY'S STUDENTS IS
AN ECONOMIC
DEVELOPMENT ISSUE. "*

MONTH			FOCUS
Jan	14	Foundation Night Goodnight Charlies Annual Meeting—mailout	D & D Fund Drive
	27	Freedom Ride Prep begins	
Feb	14	Early LFR Packet pick up - 4-7PM	LFR
	15	Freedom Ride Cycling Event	LFR
	24	Foundation Meeting (5:30PM) FLNB	
Mar	9-13	LISD Spring Break	
	23	Foundation Meeting (5:30PM) FLNB	
	30	Grants submission deadline	Grants
Apr	7	Stop by the office day Janie Ripkowski Grant	
	TBD	Grant committee meeting	
	27	Foundation Meeting (5:30PM) FLNB/ Grant Notification	
May	TBD	Top 10 % Recognition	PR Month
	29	Graduation 8PM	
	25	Foundation Meeting (5:30PM) FLNB	
June	29	Foundation Meeting (5:30PM) FLNB Strategic Planning Committee	
July	27	Foundation Meeting (5:30PM) FLNB	
Aug	TBD	Welcome Back LISD /Payroll Deduction Faculty Meetings	Purchasing for grants
	31	Foundation Meeting (5:30PM) FLNB	
Sept	28	Foundation Meeting (5:30PM) FLNB	
Oct	26	Foundation Meeting (5:30PM) FLNB Alumni Assoc. events	
Nov	6, 7	D and D event	Find new officers/directors
	30	Foundation Meeting (5:30PM) FLNB	
Dec	28	Foundation Meeting (5:30PM) FLNB	
		Last day for contributions	PR