**Development Committee Update 2021/22**

**June 7, 2022**

| **Updated 6/6/22** |  | **$ 16,424.12** | **Rolled Over Amount from 2020/21** |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | **$ 44,509** | **Amount Raised in 2021/22 School Year** |  |  |  |  |
| **Fundraising "Buckets"** | **Est % of Dev Budget** | **$ 60,933** | **'21/22 Actual Amt. Spent** | **'21/22 Actual %** | **Amount Remaining** | **Spending Description** | **General Description** |
| Large Project | 20% | $ 12,187 |  | 0% | **$ 15,187** |  | This includes a $3000 contribution that was earmarked SPECIFICALLY for outdoor environmental enhancements |
| Small Project | 10% | $ 6,093 | $ 5,369 | 9% | **$ 724** | Based of MS Garden $3000 grant ($2935.10); MS Blinds ($2347.90) |  |
| Capital Improvements | 20% | $ 12,187 |  | 0% | **$ 12,187** |  |  |
| Education | 17% | $ 10,359 | $ 10,838 | 18% | **$ (479)** | Bus to Carowinds & Chestnut Ridge | \*\*See above |
| Community Goodwill/Sterling Community | 30% | $ 18,280 | $ 11,848 | 19% | **$ 6,432** | Sterling Spirit Wear, Garden Day, Teacher Appreciation; International Festival Expenses to date | (PFSA Funds) |
| Donations to external non-profit | 3% | $ 1,828 |  | 0% | **$ 1,828** |  |  |
| **Totals** | **100%** | **$ 60,933** | **$ 28,055** |  | **$ 35,879** |  |  |

* Received $3000 donation specifically earmarked for outdoor environment enhancement

**May 12, 2022**

**Development Buckets**

| **Updated 5/11/22** |  | **$ 16,424** | **Rolled Over Amount from 2020/21** |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | **$ 43,665** | **Amount Raised in 2021/22 School Year** |  |  |  |
| **Fundraising "Buckets"** | **Est % of Dev Budget** | **$ 60,089** | **'21/22 Actual Amt. Spent** | **'21/22 Actual %** | **Amount Remaining** | **Spending Description** |
| Large Project | 20% | $ 12,018 |  | 0% | **$ 12,018** |  |
| Small Project | 10% | $ 6,009 | $ 4,584 | 8% | **$ 1,425** | Based of MS Garden $3000 grant ($2935.10); MS Blinds ($2347.90) |
| Capital Improvements | 20% | $ 12,018 |  | 0% | **$ 12,018** |  |
| Education | 17% | $ 10,215 | $ 10,001 | 17% | **$ 215** | Bus to Carowinds & Chestnut Ridge |
| Community Goodwill/Sterling Community | 30% | $ 18,027 | $ 6,569 | 11% | **$ 11,458** | Sterling Spirit Wear, Garden Day, Teacher Appreciation; International Festival Expenses to date |
| Donations to external non-profit | 3% | $ 1,803 |  | 0% | **$ 1,803** |  |
| **Totals** | **100%** | **$ 60,089** | **$ 21,153** |  | **$ 38,936** |  |
| **2021/22 Estimate of upcoming expenses** |  |  |  |  |  |  |
| Matt Oberst Scholarship | $ 500.00 |  |  |  |  |  |
| 3% donation to Carying Place (Line#6) | $ 1,803.00 |  |  |  |  |  |
| **TOTAL** | **$ 2,303.00** |  |  |  |  |  |
| Remaining Amount | $ 36,633 | $ 969 | $ 37,601 |  |  |  |
|  |  | Spirit Wear sales |  |  |  |  |

* **Natural Leaning Design Initiative** to enhance our outdoor learning environments -
  + Beiber Landscaping (requested secondary quote) came out April 5, 2022. Have not heard a word back.
  + NLI on hold until it’s decided the direction the Board wants to go.
  + No Buildings/Grounds Committee meeting held yet, although there is some interest
  + I had a parent inquire on Tuesday about donating SPECIFICALLY to outdoor initiatives - I said money could be earmarked for that (i.e. applied to Large/Capital buckets). I don’t know the amount yet, nor has she donated electronically.
* Grandparent/Stewards email with Newsletter #2 and soft appeal for donations,resulted in just a couple donations, unfortunately.
* I wanted to do another Why I Give appeal in May with the Sick Family, who agreed, however I have not heard back from them (deadline was Friday)
* We do have money, though, that should be spent (at least from Large Buckets and Capital Improvements - roughly $24,000) before the end of the fiscal year. The Sterling Community Bucket is all PFSA and we could roll the remaining amount over for next school year (~$11,000).
* Annual Report for end of year – need topics on how money was spent. Asking Directors to also give pictures/stories of our Community “Giving Back”.
* **PFSA Events -** Teacher Appreciation Week (last week), PFSA Meeting held, but only 2 parents attended. Most Chairs from this year have agreed to Chair next year - good for fundraising (Charleston Wrap in the Fall), Giving Tree, Holiday Treat Exchange, Pictures.

**Wednesday, April 6,2022**

**Development Buckets**

| **Updated 4/6/22** |  | **$ 16,424.12** | **Rolled Over Amount from 2020/21** |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | **$ 41,036** | **Amount Raised in 2021/22 School Year** |  |  |  |
| **Fundraising "Buckets"** | **Est % of Dev Budget** | **$ 57,460** | **'21/22 Actual Amt. Spent** | **'21/22 Actual %** | **Amount Remaining** | **Spending Description** |
| Large Project | 20% | $ 11,492 |  | 0% | **$ 11,492** |  |
| Small Project | 10% | $ 5,746 | $ 5,283 | 31% | **$ 463** | Based of MS Garden $3000 grant ($2935.10); MS Blinds ($2347.90) |
| Capital Improvements | 20% | $ 11,492 |  | 0% | **$ 11,492** |  |
| Education | 17% | $ 9,768 | $ 9,559 | 17% | **$ 209** | Bus to Carowinds & Chestnut Ridge |
| Community Goodwill/Sterling Community | 30% | $ 17,238 | $ 8,995 | 16% | **$ 8,243** | Sterling Spirit Wear, Garden Day, Teacher Appreciation; International Festival Expenses to date |
| Donations to external non-profit | 3% | $ 1,724 |  | 0% | **$ 1,724** |  |
| **Totals** | **100%** | **$ 57,460** | **$ 23,837** |  | **$ 33,623** |  |

**Tuesday, March 8, 2022**

* **Development Buckets**

| **Updated 3/3/22** |  | **$ 16,424.12** | **Rolled Over Amount from 2020/21** |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | **$ 35,336** | **Amount Raised in 2021/22 School Year** |  |  |  |
| **Fundraising "Buckets"** | **Est % of Dev Budget** | **$ 51,760** | **'21/22 Actual Amt. Spent** | **'21/22 Actual %** | **Amount Remaining** | **Spending Description** |
| Large Project | 20% | $ 10,352 |  | 0% | **$ 10,352** |  |
| Small Project | 10% | $ 5,176 | $ 5,283 | 34% | **$ (107)** | Based of MS Garden $3000 grant ($2935.10); MS Blinds ($2347.90) |
| Capital Improvements | 20% | $ 10,352 |  | 0% | **$ 10,352** |  |
| Education | 17% | $ 8,799 |  | 0% | **$ 8,799** |  |
| Community Goodwill/Sterling Community | 30% | $ 15,528 | $ 5,743 | 11% | **$ 9,785** | Sterling Spirit Wear, Garden Day, Teacher Appreciation Expenses to date |
| Donations to external non-profit | 3% | $ 1,553 |  | 0% | **$ 1,553** |  |
| **Totals** | **100%** | **$ 51,760** | **$ 11,027** |  | **$ 40,734** |  |

* **Natural Leaning Design Initiative** to enhance our outdoor learning environments -
  + Q&A held last week
  + Cost for phase 1 is around $30k (need updated figures based on NCSU salary increases); estimated EOY Development expenses run approx $15k (buses, International Festival, Matt Oberst, Teacher Appreciation, etc.).
* **PFSA Events upcoming** - Garden Day, International Festival, on-going Teacher Appreciation, Movie Night, Graduation
* **Alumni** Day was canceled, however we did an outreach to 2018 graduates on the $500 Matt Oberst scholarship. Deadline for submission is April 22.
* **Grandparent/Stewards** email with Newsletter #2 and soft appeal for donations.

**Thursday, February 10, 2022**

* **Development Buckets**
  + Purchased blinds for MS; additional Spirit Wear purchase
  + Will be supporting the buses for Music to Carowinds, and EL community building day trip (in light of BJP)

| **Updated 2/10/22** |  | **$ 16,424.12** | **Rolled Over Amount from 2020/21** |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Fundraising "Buckets"** | **Est % of Dev Budget** | **$ 50,715** | **'21/22 Actual Amt. Spent** | **'21/22 Actual %** | **Amount Remaining** | **Spending Description** |
| Large Project | 20% | $ 10,143 |  | 0% | **$ 10,143** |  |
| Small Project | 10% | $ 5,071 | $ 4,548 | 30% | **$ 524** | Based of MS Garden $3000 grant; MS Blinds |
| Capital Improvements | 20% | $ 10,143 |  | 0% | **$ 10,143** |  |
| Education | 17% | $ 8,621 |  | 0% | **$ 8,621** |  |
| Community Goodwill/Sterling Community | 30% | $ 15,214 | $ 5,743 | 11% | **$ 9,471** | Sterling Spirit Wear, Garden Day, Teacher Appreciation Expenses to date |
| Donations to external non-profit | 3% | $ 1,521 |  | 0% | **$ 1,521** |  |
| **Totals** | **100%** | **$ 50,715** | **$ 10,291** |  | **$ 40,424** |  |

* **Natural Leaning Design Initiative** to enhance our outdoor learning environments -
  + Grounds Committee approved by LHU Board
  + Initial proposal received and reviewed by Josie/Stephanie/Robert - decision needed on how we should proceed
* **PFSA Virtual Book Fair happening now**
  + Populating the level libraries as well as donations to The Carying Place
  + Quail Ridge to give Sterling 21% of proceeds that will go to Annual Fund
  + Feedback has been very positive, especially with the diverse choices in the Wish Lists - goes well with our newsletter theme
* **Next Quarterly Newsletter planned for Next week**
  + Topics include how holidays/varied cultures are celebrated at Sterling
  + DEI section to highlight the work being done in that committee as well

**Thursday, January 13, 2021**

* **Development Buckets** - That being said, we are in pretty good shape with regards to our current Development fund/buckets:

|  | **Fundraising "Buckets"** | Est % of Dev Budget | **$ 41,109** | '21/22 Actual Amt. Spent | **'21/22 Actual %** | **Amount Remaining** | **Spending Description** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 1 | Large Project | 20% | $ 8,222 |  | 0% | **$ 8,222** |  |
| 2 | Small Project | 10% | $ 4,111 | $ 2,054 | 17% | **$ 2,057** | Based of MS Garden $3000 grant; |
| 3 | Capital Improvements | 20% | $ 8,222 |  | 0% | **$ 8,222** |  |
| 4 | Education | 17% | $ 6,989 |  | 0% | **$ 6,989** |  |
| 5 | Community Goodwill/Sterling Community | 30% | $ 12,333 | $ 4,775 | 12% | **$ 7,558** | Sterling Spirit Wear, Garden Day, Teacher Appreciation Expenses to date |
| 6 | Donations to external non-profit | 3% | $ 1,233 |  | 0% | **$ 1,233** |  |
|  | **Totals** | **100%** | **$ 41,109** | **$ 6,829** |  | **$ 34,280** |  |

* **Natural Leaning Design Initiative** (through NC State) to enhance our outdoor learning environments -
  + Waiting on the scope of work to present to the Board
  + Decision to create a separate Grounds Improvement committee
* **Next Quarterly Newsletter planned for February 18, 2022**
  + Topics include how holidays/varied cultures are celebrated at Sterling
  + DEI section to highlight the work being done in that committee as well

**Thursday, December 9, 2021**

* **#GivingTuesday update**
  + Included a Why I Give by the Hicks family
  + Overall total of **$3045** brought in (so far); $**840** of that from the grandparent reach, with copy of newsletter and appeal for donations; used Mailchimp (outside of ParentSquare, and 2 people unsubscribed).
  + Out of 100 Grandparent emails, only received 8 donations (so far - checks could be in-coming?).
* **Development Buckets** - That being said, we are in pretty good shape with regards to our current Development fund/buckets:

|  | **Fundraising "Buckets"** | Est % of Dev Budget | **$ 34,829** | '21/22 Actual Amt. Spent | **'21/22 Actual %** | **Amount Remaining** | **Spending Description** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| 1 | Large Project | 20% | $ 6,966 |  | 0% | **$ 6,966** |  |
| 2 | Small Project | 10% | $ 3,483 | $ 2,054 | 20% | **$ 1,429** | Based of MS Garden $3000 grant; |
| 3 | Capital Improvements | 20% | $ 6,966 |  | 0% | **$ 6,966** |  |
| 4 | Education | 17% | $ 5,921 |  | 0% | **$ 5,921** |  |
| 5 | Community Goodwill/ Sterling Community | 30% | $ 10,449 | $ 4,775 | 14% | **$ 5,674** | Sterling Spirit Wear, Garden Day, Teacher Appreciation Expenses to date |
| 6 | Donations to external non-profit | 3% | $ 1,045 |  | 0% | **$ 1,045** |  |
|  | **Totals** | **100%** | **$ 34,829** | **$ 6,829** |  | **$ 27,999** |  |

* **Natural Leaning Design Initiative** (through NC State) to enhance our outdoor learning environments -
  + Met with Robin Moore and Mary Archer last week. They toured campus and spoke in depth with Josie, Todd and I.
  + Sterling has a long history with the organization, including a full design plan completed in 2000. There was a small resurgence of discussion in 2007 (before the sports court and MS were built).
  + To redo the Master Design plan would require a substantial investment - Josie to discuss in Finance
  + We also need to discuss with governance about forming a new committee
  + However, a capital project like this would be a good Development fund goal and community (including corporate) engagement.
* **Next Quarterly Newsletter planned for February 18, 2022**
  + Topics include how holidays/varied cultures are celebrated at Sterling
  + DEI section to highlight the work being done in that committee as well

**Tuesday, November 9, 2021**

* **Quarterly Newsletter -** Completed and released last week with good feedback. Next newsletter (Feb/March) will talk about celebrating holidays and cultures in the Montessori classroom
* New **“Why I Give”** established with the Hicks family - waiting for their info. Will release with the Giving Tuesday push
* **Giving Tuesday** is Tuesday, November 30th. Plan on ParentSquare push and a separate Grandparents/ Friends push through MailChimp.
  + Classroom Challenge? Class winners receive pizza/popsicle lunch - may not want to do this until the Spring, as we did do this for Charleston Wrap.
  + Grandparent Challenge - $2500 for the 25th anniversary?
  + Could track on the website
* **Development Funds**
  + **Deposited Charleston Wrap fundraiser** $8,264.50 for Sterling
  + **2021/22 Annual Fund** collected to date: **$6,245**

|  | **Updated 11/3/21** |  | **$ 16,424.12** | **Rolled Over Amount from 2020/21** |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Fundraising "Buckets"** | Est % of Dev Budget | **$ 31,828** | '21/22 Actual Amt. Spent | **'21/22 Actual %** | **Amount Remaining** | **Spending Description** | **General Description** |
| 1 | Large Project | 20% | $ 6,366 |  | 0% | **$ 6,366** |  |  |
| 2 | Small Project | 10% | $ 3,183 | $ 2,054 | 22% | **$ 1,129** | Based of MS Garden $3000 grant; |  |
| 3 | Capital Improvements | 20% | $ 6,366 |  | 0% | **$ 6,366** |  |  |
| 4 | Education | 17% | $ 5,411 |  | 0% | **$ 5,411** |  |  |
| 5 | Community Goodwill/Sterling Community | 30% | $ 9,548 | $ 4,701 | 15% | **$ 4,848** | Sterling Spirit Wear, Garden Day, Teacher Appreciation Expenses to date | (PFSA Funds) |
| 6 | Donations to external non-profit | 3% | $ 955 |  | 0% | **$ 955** |  |  |
|  | **Totals** | **100%** | **$ 31,828** | **$ 6,755** |  | **$ 25,073** |  |  |

* **ESSER III Funds update**
  + Purchasing smaller items (tables, shade sails, soccer goals)
  + Working with Todd on estimates for larger projects, including design
    - Did hear back from the Natural Learning Initiative at NCSU - they know we are in the queue to discuss collaboration.
* **Whole Kids Garden Grant** - working with Tom K. over the year to collect process information and pictures of our MS Garden
* Reporting back to the **Heritage Foundation** for the grant we won for the Orienteering compasses. This includes receipts and pictures.
* Looking into grant for BJP buses again for the Spring.

**​​Thursday, October 14, 2021**

· **ESSER III Funds update**

o Met with Team Reps on 10/5 and gathered their requests for each levels.

* Many requests we already have funds for (i.e. small soccer goals in the CH playground, tables and shade sails for LE, UE, MS and Field area)
* Working with Todd on getting estimates for larger projects, so we specifics for fundraising
* Contacted the Natural Learning Initiative at North Carolina State University -<https://naturalearning.org/programs-projects/> to partner in design of our outdoor spaces. They have worked with other Montessori schools
* Starting a prospectus on the outdoor environment education

· **Quarterly newsletter**

o Aiming for November 5th release date

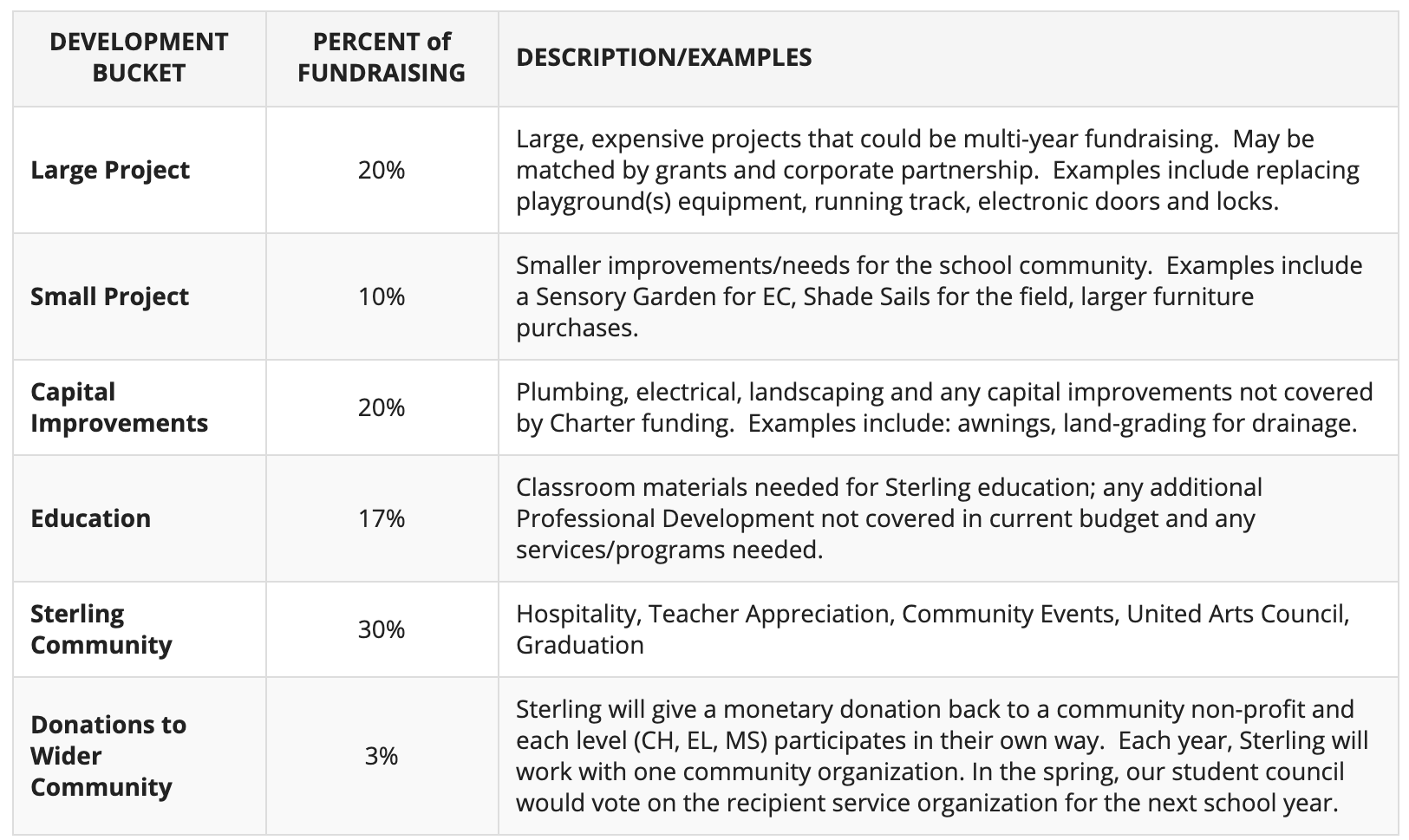
o This can be used as an extended learning tool for families, as well as for marketing

· **Charleston Wrap fundraiser** raised $8,264.50 for Sterling – awaiting check deliver which should come in November. It’s still open through December 3rd, so that number may go up. Very simple and easy according to our Fundraising Chair.

* **Need to have 100% Board participation** - only ⅓ of directors have contributed. Again, this makes for a compelling argument.
* **Grandparents and Sponsor campaign** “Growing into our Future”?? Working on a MailChimp campaign to connect to our grandparent data pulled.
* **Development Funds**
  + Development Account - currently at $21,862.24 ($16,424.12 was “rollover” from previous year)
  + 21/22 Annual Fund collections (since July 1) - $4,893.44

**Thursday, September 9, 2021**

* ESSER III funds (~$197k) to be used for **outdoor environments - leading drive for Development focus**
  + Parent Survey of needs/wants - Review what was asked previously from families
  + Team Rep questions (to poll classes/levels for outdoor needs) - Josie met with them on Tuesday, Sept 7
    - What type of outdoor improvement would you like to have near your classroom?
    - How would this improvement be incorporated into Montessori education for your students?
    - What feature would you like added to Sterling in any outdoor environment?
    - How can you imagine this feature/improvement enhancing the student’s Montessori experience?
  + LE/UE/MS Student requests - present at Student Council and have them follow up. Assigned to Justin/Carrie to discuss at the first meeting (Oct 1)
* From the above feedback, we can create a story about our goals for 2021/22. This can then be taken to businesses - creating a “Package” with the plan for this year, and the Annual Report from last year
* Charleston Wrap virtual fundraiser to run the next two weeks. Information has been distributed to classrooms with the class goals. Jenn Jewett is charing
* Meeting with Morrisville Chamber of Commerce - in person - on Tuesday, September 14th for Meet & Coffee (first in-person in a long time)
* **Need to have 100% Board participation** - only ⅓ of directors have contributed. Again, this makes for a compelling argument. The same would be true for Administration, at the very least.
* Grandparents and Sponsor campaign “Growing into our Future”?? In addition to our compelling story - would love involvement in generating ideas to hook grandparents
  + Have pulled information from Infosnap - need to import it into Little Green Light
  + Worth doing a digital and snail mail campaign/postcards?
* Reminder of our Development Buckets and current totals
  + Development Account - currently at $17,734.55 ($16,424.12 was “rollover” from previous year)
  + 21/22 Annual Fund collections (since July 1) - $3,491.96
  + All money out to date has been for PFSA - Spirit Wear, Movie Night licenses, Yearbook (2020/21) and we paid for $350 for the compasses for PE with the grant we won last year.



Annual Fund 2021/22 Calendar/Timeline

Grants for transportation