



WE ARE THE **CHAMPIONS**

Game Plan for Success: Hot Topics Shaping Education Foundations

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CALL THE PLAY. TEST THE MISSION. LEAD WITH DISCIPLINE.

Champions make the call with four checks

Use these questions before every YES, NO, or MAYBE.

01

MISSION

Does this strengthen the Foundation's purpose?

02

GOVERNANCE

Does the decision respect the right process and roles?

03

RELATIONSHIPS

What does the district need—and where should the Foundation help?

04

POLICY

Which district rules, donor expectations, or privacy concerns control the play?

PARTNERSHIP + GRANTS

The school district wants the Education Foundation to serve as a pass-through for a private family foundation grant supporting homeless students—and wants the EF director to manage it. Should the EF agree?



CALL THE PLAY

YES

NO

MAYBE

3 SECONDS

Vote first. Then advance for the ruling.

THE RULING • SCENARIO 01

PARTNERSHIP + GRANTS

YES

The playbook's call is YES.

CHAMPIONSHIP PRINCIPLE

Align the purpose, administration, and roles before the handoff.

WHY?

What condition, relationship, policy, or mission test makes this call defensible?



COMMUNICATIONS + ADVOCACY



02

Enrollment is dropping. The district communications team strongly encourages the Foundation to reshare a social campaign designed to boost enrollment. Should the EF agree?

CALL THE PLAY

YES

NO

MAYBE

3 SECONDS

Vote first. Then advance for the ruling.

THE RULING • SCENARIO 02

COMMUNICATIONS + ADVOCACY

YES

WITH CONDITIONS

WHY?

What condition, relationship, policy, or mission test makes this call defensible?

Support the district campaign only with clear alignment on what the Foundation is endorsing.

CHAMPIONSHIP PRINCIPLE

Partnership is strongest when the Foundation's voice stays mission-aligned.



EMPLOYEE SUPPORT + RECOGNITION

The district wants the Foundation to fund a districtwide employee bonus program distributed at Convocation. The Foundation has enough money. Should it agree?



CALL THE PLAY

YES

NO

MAYBE

3 SECONDS

Vote first. Then advance for the ruling.

THE RULING • SCENARIO 03

EMPLOYEE SUPPORT + RECOGNITION

YES

WITH CONDITIONS

The supplied condition: ensure the Education Foundation receives recognition.

CHAMPIONSHIP PRINCIPLE

If the Foundation funds the win, make its contribution visible.

WHY?

What condition, relationship, policy, or mission test makes this call defensible?



REVENUE + OPERATIONS



04

A board member asks the Education Foundation to sell school district merchandise, with proceeds benefiting the Foundation. Should the EF agree?

CALL THE PLAY

YES

NO

MAYBE

3 SECONDS

Vote first. Then advance for the ruling.

THE RULING • SCENARIO 04

REVENUE + OPERATIONS

NO

The playbook's call is NO.

CHAMPIONSHIP PRINCIPLE

Not every revenue idea belongs inside the Foundation's operating lane.

WHY?

What condition, relationship, policy, or mission test makes this call defensible?



SPONSORSHIP + DISTRICT ASSETS

A sponsor offers a donation if the district adds the sponsor's name to the scoreboard for free, beside organizations that paid for advertising. Should the EF proceed?



CALL THE PLAY

YES

NO

MAYBE

3 SECONDS

Vote first. Then advance for the ruling.

THE RULING • SCENARIO 05

SPONSORSHIP + DISTRICT ASSETS

NO

The playbook's call is NO.

CHAMPIONSHIP PRINCIPLE

A Foundation donation should not quietly purchase district advertising value.

WHY?

What condition, relationship, policy, or mission test makes this call defensible?



HALF TIME

INTERVIEW: Perspective from Leadership Partnering with Education Foundations

HALF TIME

CHAMPION SHOUT OUTS

TOUCHDOWN

WHAT MAKES A CHAMPION

DONOR TRUST + PRIVACY



06

A board member requests the Education Foundation donor list so they can share it with another nonprofit organization. Should the Foundation provide it?

CALL THE PLAY

YES

NO

MAYBE

3 SECONDS

Vote first. Then advance for the ruling.

NO

WHY?

What condition, relationship, policy, or mission test makes this call defensible?

Protect the donor list; do not share it for another organization's outreach.

CHAMPIONSHIP PRINCIPLE

Donor trust is an asset the Foundation must protect.



BOARD GOVERNANCE

A resigning board member wants to choose their own replacement from their company or business. Should the Education Foundation allow it?



CALL THE PLAY

YES

NO

MAYBE

3 SECONDS

Vote first. Then advance for the ruling.

BOARD GOVERNANCE

NO

WHY?

What condition, relationship, policy, or mission test makes this call defensible?

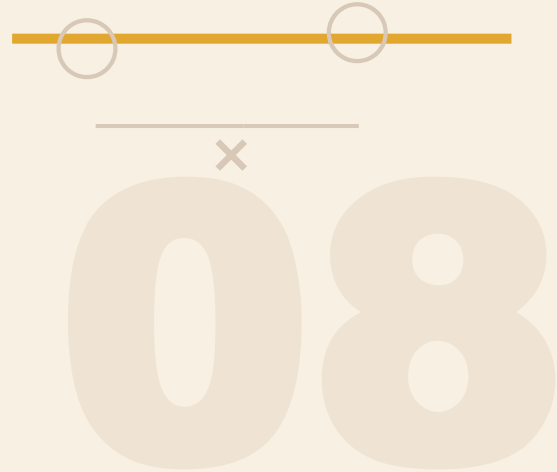
Use the Foundation's nomination process.

CHAMPIONSHIP PRINCIPLE

Board seats are filled by governance—not personal succession.



CAMPUS SUPPORT + FUNDRAISING



A campus without a PTO asks the Foundation to organize and execute a fundraiser. The campus has low scores and faces possible closure. Should the EF take the lead?

CALL THE PLAY

YES

NO

MAYBE

3 SECONDS

Vote first. Then advance for the ruling.

NO

WITH CONDITIONS

WHY?

What condition, relationship, policy, or mission test makes this call defensible?

Relationships matter, and limited support may still help. Ask what the superintendent wants and whether the work fits the mission.

CHAMPIONSHIP PRINCIPLE

Help thoughtfully without becoming the campus PTO.

EVENTS + EMPLOYEE POLICY

A district employee who serves on the EF board wants to play in the weekday golf tournament where alcohol is served. Can they use a professional-development day instead of a personal day?



CALL THE PLAY

YES

NO

MAYBE

3 SECONDS

Vote first. Then advance for the ruling.

MAYBE

WHY?

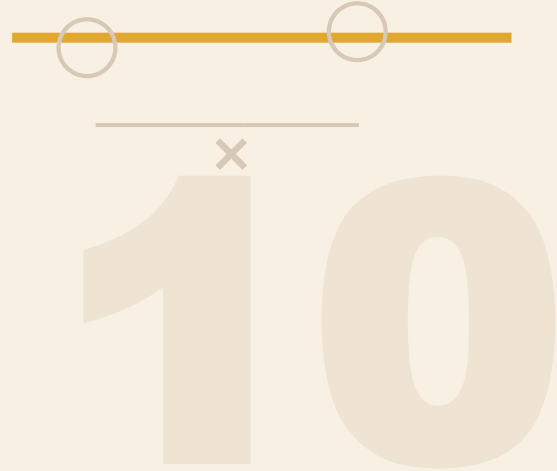
What condition, relationship, policy, or mission test makes this call defensible?

The answer depends on the district's policies.

CHAMPIONSHIP PRINCIPLE

When employment rules control the play, follow the district policy.

GRANTS + OPERATING EXPENSES



Facing a budget deficit, the district business office asks the Foundation to award one-time department grants for general operating expenditures. Funds are available. Should the EF agree?

CALL THE PLAY

YES

NO

MAYBE

3 SECONDS

Vote first. Then advance for the ruling.

THE RULING • SCENARIO 10

GRANTS + OPERATING EXPENSES

MAYBE

The ruling is **MAYBE**. The deciding question is whether the request is tied to the Foundation's mission.

CHAMPIONSHIP PRINCIPLE

Available funds do not replace mission fit.

WHY?

What condition, relationship, policy, or mission test makes this call defensible?



Champions know the play, the field—and the gray.

YES

when the mission and roles align.

NO

when governance, trust, or fairness is compromised.

MAYBE

when policy or district context must decide.

The strongest foundations ask the right questions before making the call.