



*Campaign Preparedness Report #2*  
**LEWISVILLE SCHOOLS**

September 2026

*Completed by*



## EXECUTIVE SUMMARY

- This report summarizes the qualitative and quantitative data gathered and analyzed by Academic Advancement Partners (AAP) on behalf of Lewisville ISD and Lewisville Education Foundation (LEF). This work has been completed in anticipation of a potential fundraising campaign to strengthen the permanent endowment managed by LEF for the benefit of Lewisville ISD.
- The findings of this report reveal a strong, but static fundraising history in terms of dollars raised and a downward trend in total donors. Primary fundraising activities include an annual LISD employee giving campaign, events, and corporate engagement with local businesses and LISD vendors. LEF also manages a robust scholarship program, supporting nearly 500 college-bound LISD graduates every year.
- There is a notable absence of deliberate and strategic fundraising for major gifts from individuals (\$25,000-50,000+), as well as efforts to raise awareness for planned giving opportunities. There is also a limited history of coordinated alumni engagement activity through LISD's five high schools, although there is evidence of self-organized reunions and social media activity through class-based Facebook groups.
- Recommendations in this report include proceeding into the planning phase of an endowment campaign under a specific sequence of steps. Neither LEF or LISD has undertaken any similar effort and there is a notable lack of experience across both organizations for this type of multi-year campaign. Despite this limitation, AAP is confident this campaign can be successful through the execution of the action steps recommended in this plan.

## FUNDRAISING HISTORY & PERFORMANCE – GIFT VOLUME

- The table below illustrates the number of gifts received by gift range by fiscal year. This data is requested to determine the organization's potential giving capacity and any positive or negative trends by gift amount.

|                   | FY21         | FY22         | FY23         | FY24         | FY25         | Total         | % of Total |
|-------------------|--------------|--------------|--------------|--------------|--------------|---------------|------------|
| \$100,000-249,999 | 1            | 0            | 0            | 0            | 0            | 1             | <1%        |
| \$50,000-99,999   | 1            | 1            | 1            | 0            | 0            | 3             | <1%        |
| \$10,000-49,999   | 20           | 20           | 22           | 28           | 23           | 113           | 1%         |
| \$1,000-9,999     | 152          | 146          | 142          | 136          | 133          | 709           | 6.1%       |
| Under \$1,000     | 2,235        | 2,356        | 2,490        | 1,945        | 1,701        | 10,727        | 92.8%      |
| <b>Total</b>      | <b>2,409</b> | <b>2,523</b> | <b>2,655</b> | <b>2,109</b> | <b>1,857</b> | <b>11,553</b> |            |

- While LEF generates a broad base of donor support, gift volume is concentrated mostly in gifts under \$1,000. Nearly 99% of all gifts over the past five years were under \$10,000. This demonstrates an absence of strategy and activity toward cultivating and soliciting major gifts, as well as a notable threat to the success of a major campaign.
- These figures also illustrate a precipitous decline in gift volume during this period, and especially the past two years. Gifts of \$1,000-9,999 have dropped 12.5 percent, from 152 to 133. And gifts under \$1,000 have declined 24 percent since 2021, and 32 percent from the high point in 2023.

## APPENDIX D - GIFT CHART FOR A POTENTIAL \$2 MILLION GOAL

*About half of most campaign \$ come from just ~10-12 gifts*



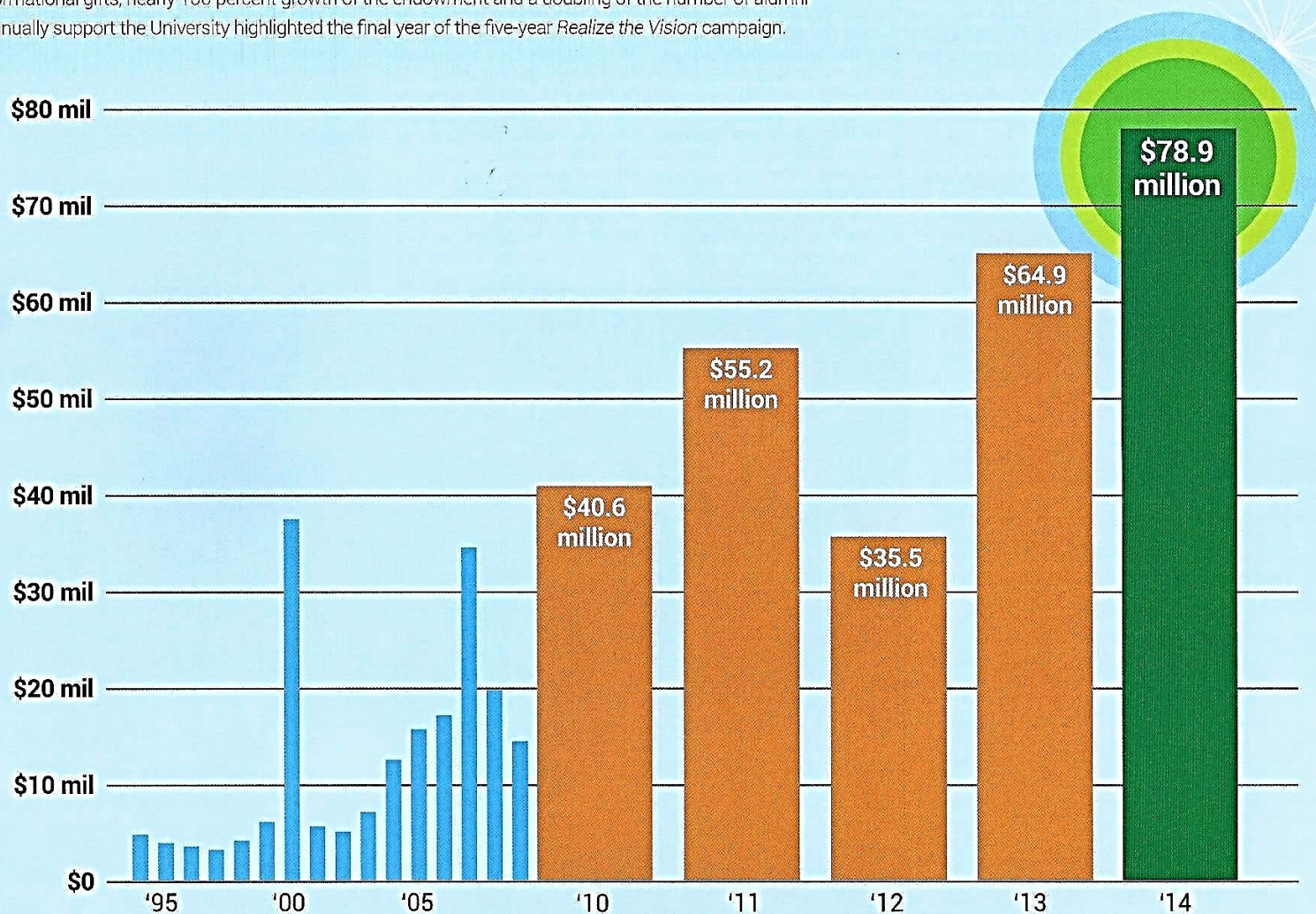
| Gift Amount | Gifts Needed | Potential Donors Needed | Cumulative Total   | Cumulative % Toward Goal |
|-------------|--------------|-------------------------|--------------------|--------------------------|
| \$150,000   | 1            | 3                       | \$150,000          | 7.5%                     |
| \$100,000   | 4            | 12                      | \$550,000          | 27.5%                    |
| \$75,000    | 5            | 15                      | \$925,000          | 46%                      |
| \$50,000    | 6            | 18                      | \$1,075,000        | 54%                      |
| \$25,000    | 7            | 21                      | \$1,250,000        | 62.5%                    |
| \$20,000    | 10           | Many                    | \$1,450,000        | 72.5%                    |
| \$15,000    | 20           | Many                    | \$1,750,000        | 87.5%                    |
| \$10,000    | 25           | Many                    | \$2,000,000        | 100%                     |
|             | <b>~75</b>   | <b>~225</b>             | <b>\$2,000,000</b> | <b>100%</b>              |

- This chart is for illustration purposes only. The sample goal of \$2 million has not been established as the goal for this campaign. A final goal is not required to be set until the later stages of the Leadership Phase in preparation for the public launch.
- Many types of gifts can count toward a campaign goal. Gifts of cash, stock, or other assets can be pledged over a period of up to five years. Planned gifts also count, including an estate commitment through a will, beneficiary designation through a retirement plan or donor advised fund, and charitable gift annuities.

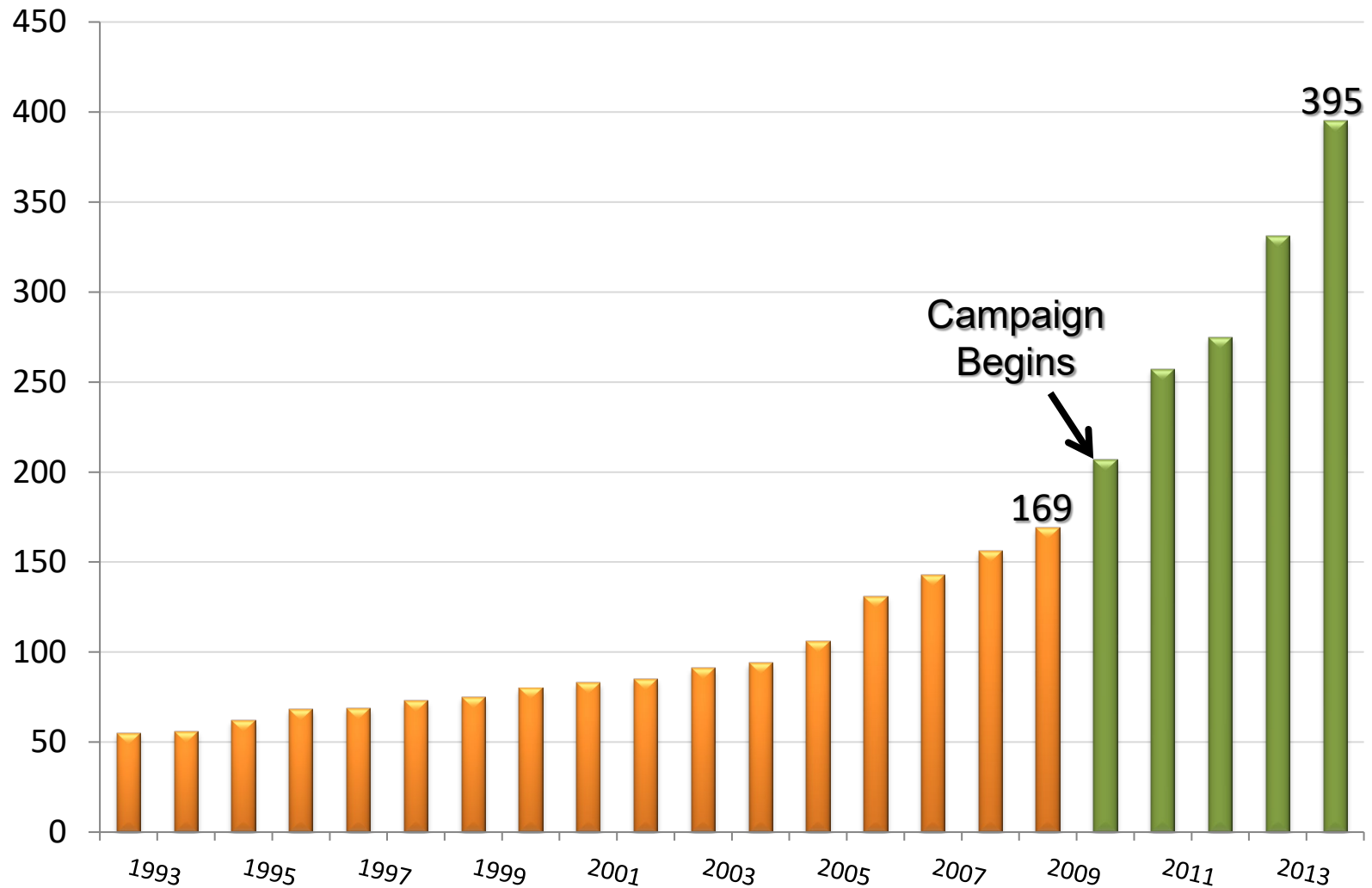
- Grants for teacher support comprise four forms; individual grants to enhance classroom teaching (from \$100 to \$2,500), Campus Excellence Grants (up to \$5,000) for campus principals and curriculum supervisors, fellowships for higher education or certification (\$500 to \$2,000), and two Awards of Excellence, with one available to special education instructors across LISD and the other for a teacher at Lewisville High School.
- This potential endowment campaign can bring much-needed context and clarity to the relationship between LEF and LISD. Despite LEF’s fundraising record built over the past 35 years, there is limited awareness among those interviewed about LEF’s impact in supporting teachers and students across the district.
- LEF’s efforts in supporting public K-12 education mirror the same evolution of fundraising across public higher education over the past 30-40 years. Local public universities, including UNT, TWU, UT Dallas, and UT Arlington, have all implemented the same broad range of institutional advancement activities that were once only found at flagship campuses like UT and Texas A&M, and private institutions like SMU, Baylor, and Rice.
- The long-term outcome for these public universities has been greater discretionary financial resources to complement their state-appropriated funding, empowering them to meet needs that are beyond the limits of their public funds. Their comprehensive fundraising efforts include raising both designated and unrestricted annual gifts, as well as strengthening permanently endowed funding. As one example, UT Dallas has seen the market value of its endowment grow from less than \$200 million in 2010 to more than \$1 billion today.

# Another Year of Unsurpassed Support

Donor support again shattered benchmarks, resulting in the strongest philanthropic year in UT Dallas history. Transformational gifts, nearly 100 percent growth of the endowment and a doubling of the number of alumni who annually support the University highlighted the final year of the five-year *Realize the Vision* campaign.

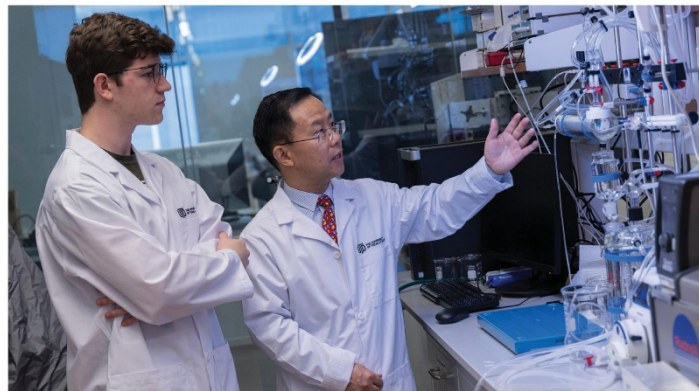


# Total Number of Endowed Funds



Presented by **UT DALLAS**

## UT Dallas Endowment Surpasses \$1 Billion Milestone



Endowed funds support 161 faculty positions and provide over \$8.5 million each year for scholarships, fellowships and student support. (Courtesy UT Dallas)

The University of Texas at Dallas' endowment has surpassed \$1 billion for the first time, marking a significant milestone in the University's growth and creating an increasingly strong foundation of permanent support for its teaching and research missions.

The UT Dallas endowment reached a market value of more than \$1.06 billion as of Aug. 31, 2026, according to The University of Texas/Texas A&M Investment Management Company (UTIMCO), which manages the University's endowment investments.

This achievement gives UT Dallas the second-largest endowment among academic institutions in UT System, behind only UT Austin, and the fourth-largest overall endowment among all UT System institutions. UTIMCO manages one of the nation's largest pools of higher education endowment assets.

"Reaching a \$1 billion endowment is a powerful marker of the progress UT Dallas has made, but the real significance of this milestone is what these resources make possible," said Dr. Prithvi V. Moghe, UT Dallas president and the Eugene McDermott Distinguished University Chair of Leadership. "A strong endowment allows us to invest in talented students and faculty, advance research across disciplines and pursue opportunities that will strengthen North Texas and extend our impact well beyond the region. It provides support for the work of the University today while ensuring that future generations will have the resources to pursue discoveries and possibilities we cannot yet imagine."

**Campaign Fuels Endowment Growth**  
The achievement comes as UT Dallas enters the final stage of its comprehensive campaign, New Dimensions: The Campaign for UT Dallas, which has now raised \$800 million toward its \$750 million goal.

Since the campaign began, the UT Dallas endowment has grown by about 120% in less than a decade. That growth reflects both long-term investment performance and a significant expansion of philanthropic support. During the New Dimensions campaign, donors have contributed nearly \$140 million in new gifts to the endowment and established 117 new endowed funds.

The campaign, which entered its public phase in 2021, was designed to build the permanent resources needed to attract outstanding students and faculty and expand the impact of research at UT Dallas. Endowed gifts established during the campaign support scholarships, graduate fellowships, faculty positions, research and academic programs, among other priorities.

"Surpassing \$1 billion is an important milestone, but what matters most is the impact these resources have across UT Dallas," said Michael Reza, vice president for advancement. "Every endowed scholarship, faculty position and program represents a donor choosing to invest in the people and ideas that make this University exceptional. The growth we have seen during the New Dimensions campaign reflects tremendous confidence in UT Dallas and creates even greater momentum for what we can accomplish together."

### Permanent Support for the University's Mission

Unlike funds that are intended to be spent immediately, endowed gifts are invested for the long term. A portion of their value is distributed each year to support the purpose designated for the fund, while the remainder continues to be invested to provide resources for future generations.

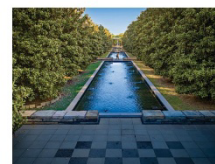
Today, endowed resources support 161 faculty positions, helping UT Dallas recruit and retain accomplished scholars whose teaching, mentorship and research strengthen academic programs across campus. Endowments dedicated to scholarships, fellowships and other student support programs generate more than \$8.5 million each year to drive student success.

For UT Dallas, the billion-dollar milestone also reflects the cumulative generosity of alumni, friends, foundations, corporations and other supporters who have invested in the University throughout its history.

"Choosing this threshold places UT Dallas among a relatively small group of universities nationally with endowments of this scale and gives us an even stronger foundation to attract exceptional talent, invest in our ideas and pursue opportunities that can shape the future of North Texas and beyond," Reza said. "We have tremendous momentum to build upon, and we are deeply grateful to the donors whose generosity and belief in UT Dallas have made this achievement possible."

### Endowed Support Makes an Impact

Endowed funds like the Mary and Richard Tompston Fellowship support emerging students like Deysha Dadkhah, a mechanical engineering doctoral student conducting nanoscale research at UT Dallas.



UT Dallas has the second-largest endowment among academic institutions in the UT System and the fourth-largest overall among all UT institutions. (Courtesy UT Dallas)

Dadkhah came to UT Dallas to pursue his PhD and conduct research in the Laboratory for Dynamics and Control of Nanosystems, where he studies micro-electromechanical systems with applications in advanced precision engineering. The Tompston Fellowship provided support as a critical resource in Dadkhah's academic career—and gave him renewed motivation to continue pursuing his research.

"UT Dallas invested in me, and I am not going to forget that," Dadkhah said. "I hope to do something that will make the whole University proud to have me here." He hopes one day to return that investment by helping future students as others have helped him.

Dadkhah's experience illustrates how endowed support can create opportunities today while extending the generosity of donors to future generations of UT Dallas students.

Read more stories of students, faculty and researchers whose lives and work have been transformed by philanthropy at [newdimensions.utdallas.edu](http://newdimensions.utdallas.edu)

By The University of Texas at Dallas  
Special Contributor



## FUNDRAISING HISTORY & PERFORMANCE – TOTAL GIVING

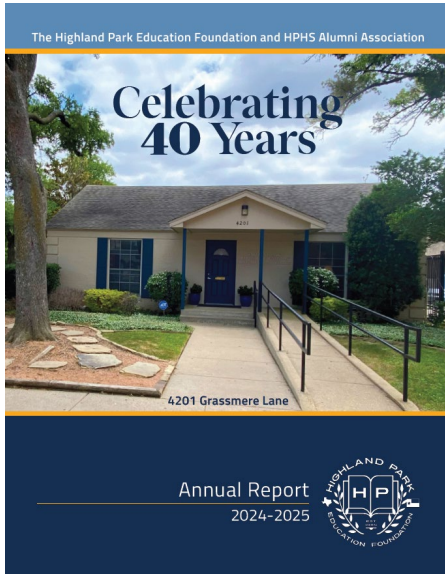
- LEF raises private support primarily through events, a corporate partners program, and annual giving efforts that includes an employee giving initiative across all LISD schools. The five-year fundraising totals below represent cash gifts received. The figures do not reflect any multi-year pledge values as there were no documented pledges during this period.



# Lead *for* Tomorrow

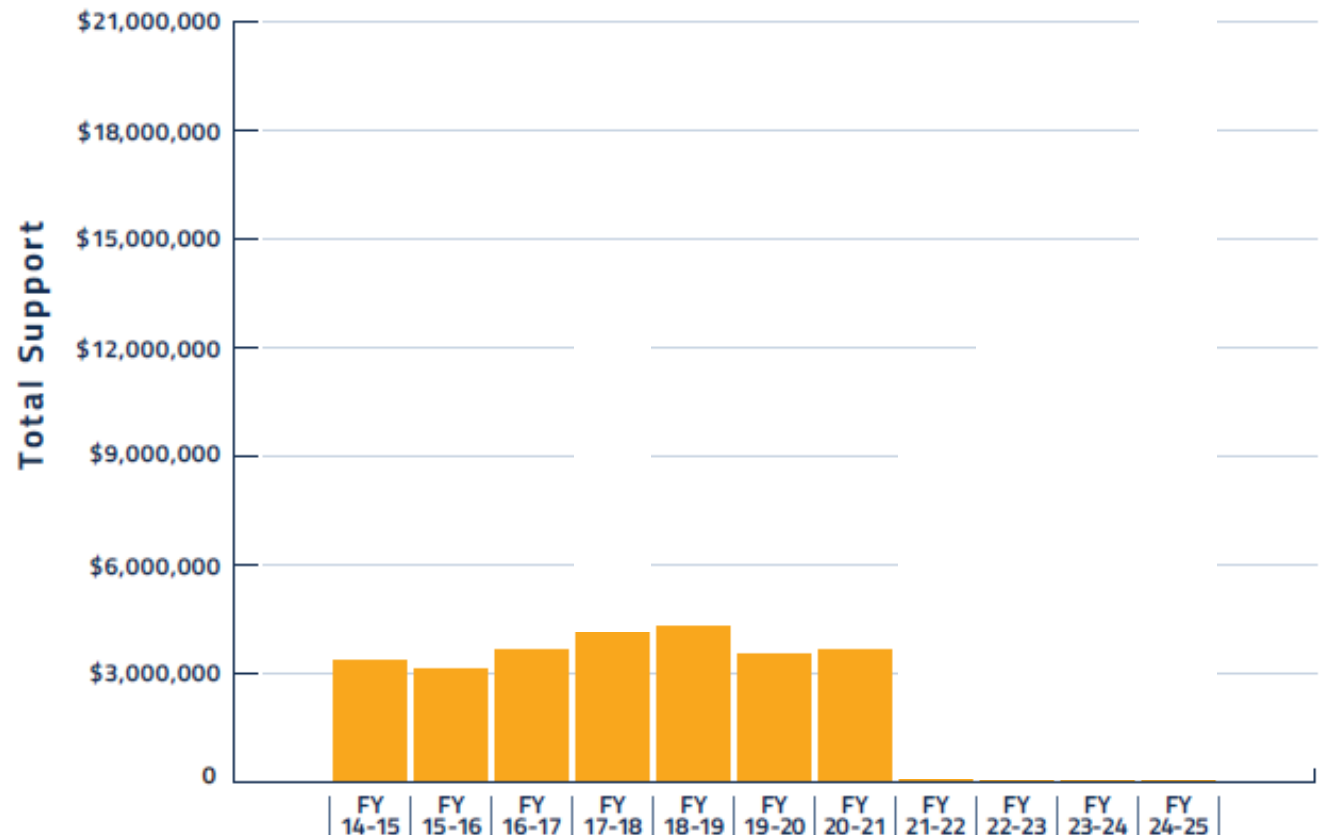
Endowment Campaign  
for Highland Park Schools

## Financial Report



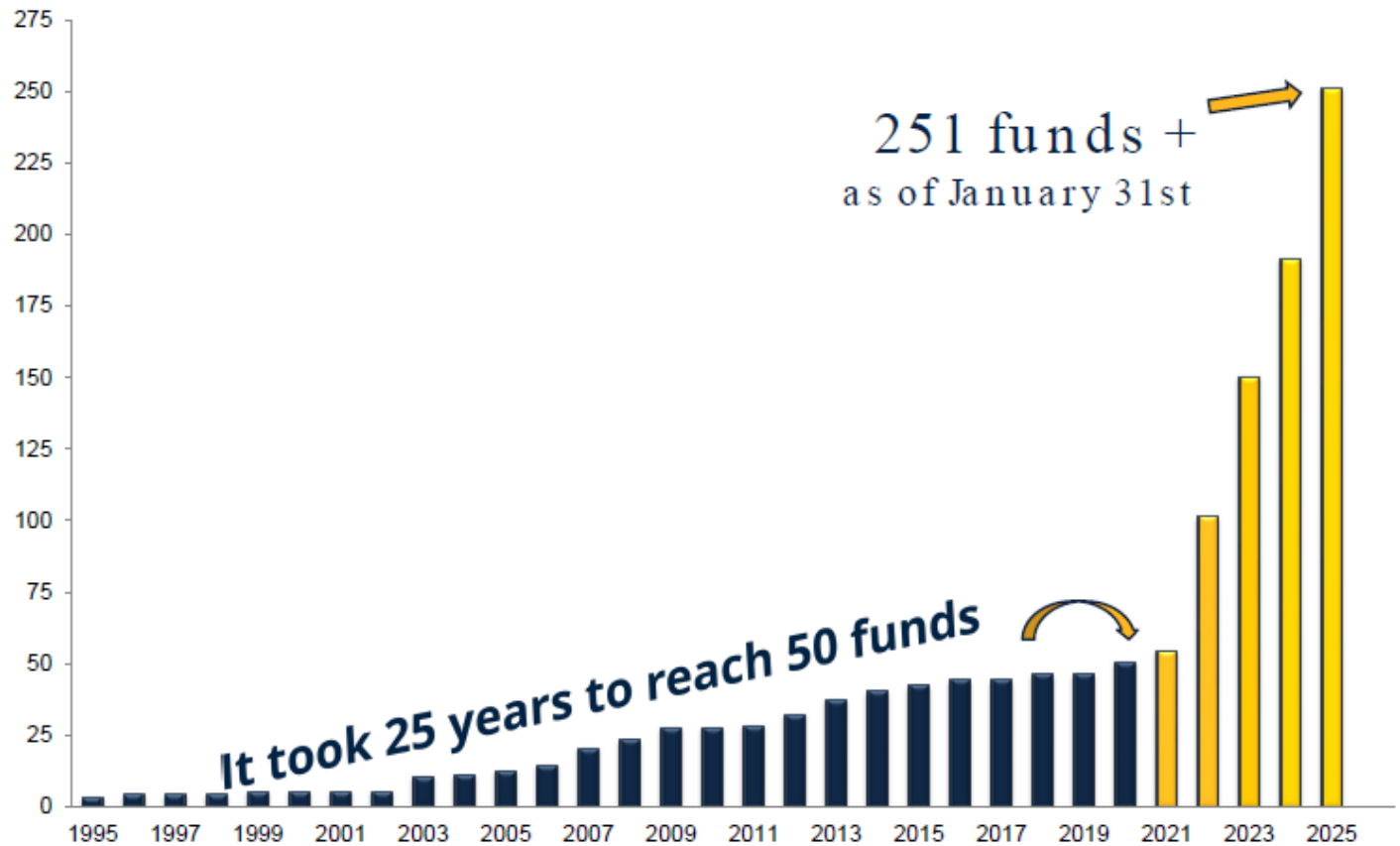
Available at:  
[www.hpef.org/news](http://www.hpef.org/news)

### Total Philanthropic Support



Annual totals represent cash gifts received and new pledges committed.

## Total Number of Funds in the Tartan Endowment

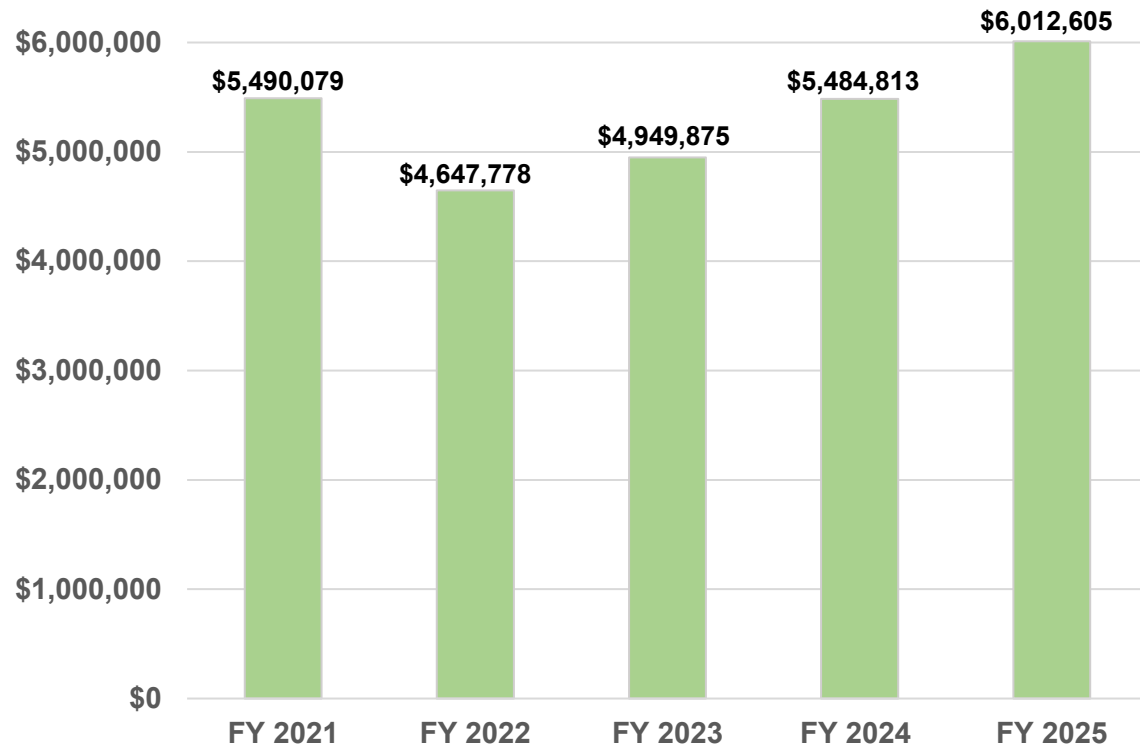


## FUNDRAISING HISTORY & PERFORMANCE – ENDOWMENT

- LEF's endowment is notable among its peer foundations. IRS Form 990s do not separate endowment funds from "total assets" but do provide helpful insights. Total assets reported in 2025 for peer foundations show Frisco (\$5.7M), Prosper (\$3.8M), Plano (\$2.4M), Allen (\$1.9M), and Richardson (\$0.5M) all trail LEF in the market value of their endowments.
- The number of new funds added is also encouraging. Total funds have grown nearly 30 percent over the past five years, with an average of nearly 10 new funds added each year.

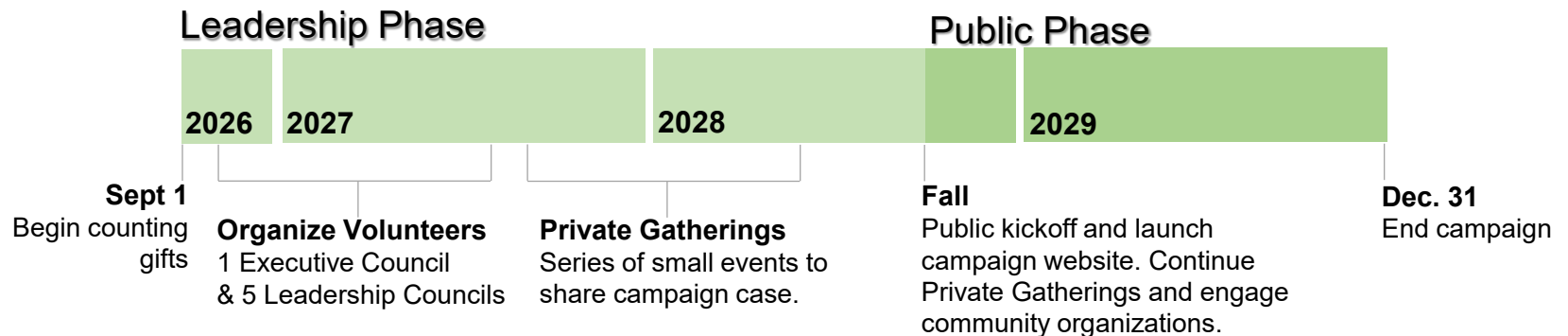
### Total Number of Funds

FY 2025 = 220  
FY 2024 = 217  
FY 2023 = 205  
FY 2022 = 186  
FY 2021 = 172



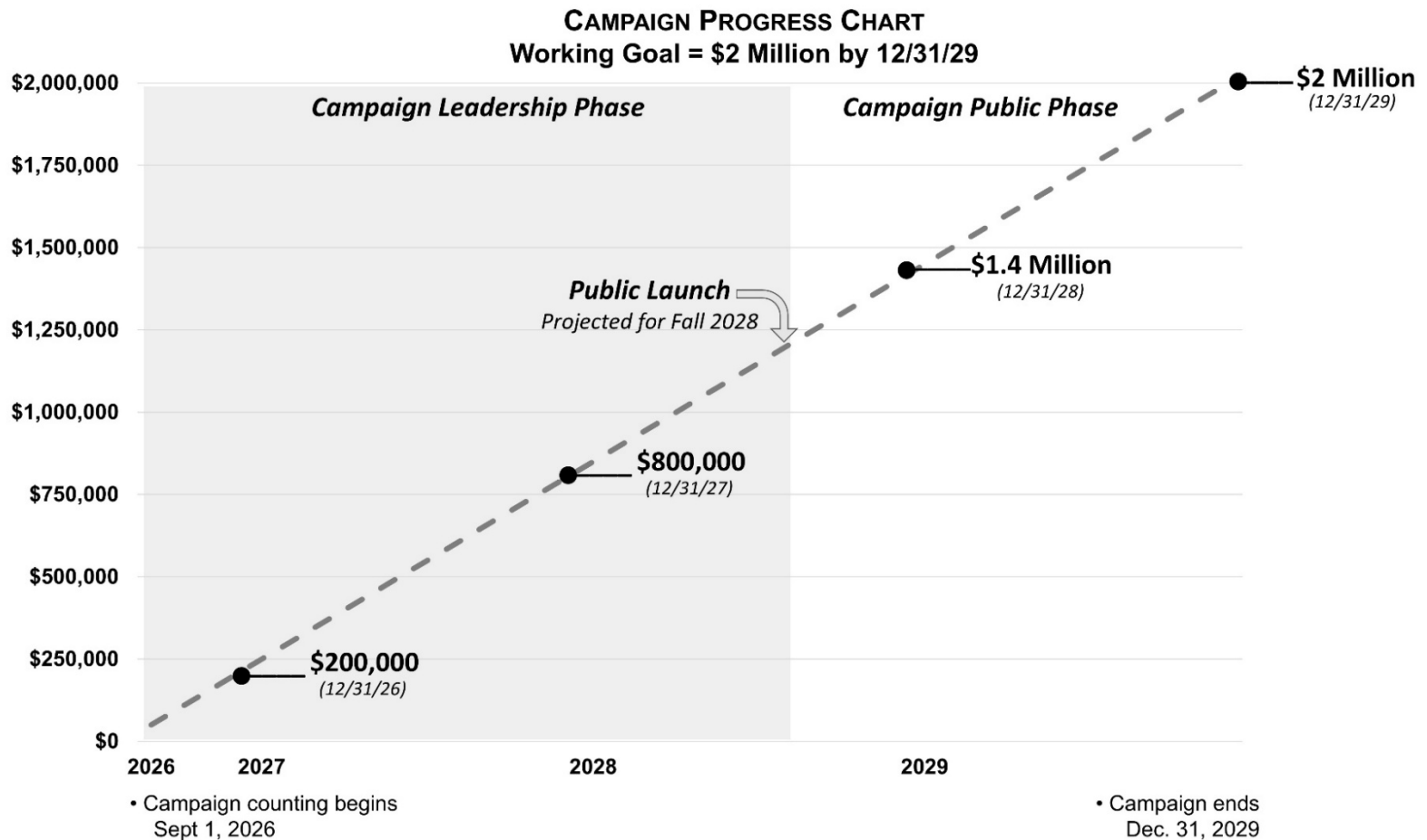
## RECOMMENDATIONS

- Based on the information gathered and reviewed for both campaign preparedness reports, the following recommendations are submitted for consideration.
  - Recommendation #1: Campaign Timeframe**
    - Proceed with an initial campaign timeframe of 3+ years (40 months); Sept. 1, 2026 through Dec. 31, 2029.
    - Through 2026, follow up with interview participants who expressed interest in supporting the campaign or want to learn more about it. Secure 10+ lead gifts by Dec. 31, 2026.
    - Assemble & train campaign volunteer leadership to include one Executive Council and five Leadership Councils (See Recommendation #4 for more detail on volunteers). Provide all with a campaign brochure in early 2027 to use with lead donors.
    - Convene small groups of alumni, friends, churches, and others to share the campaign case and vision through events in fall 2027 and spring 2028 leading up to public launch.



– **Recommendation #2: Campaign Working Goal**

- Establish a working goal of \$2 million over the initial campaign timeframe of 40 months. This dollar goal can be increased prior to the public launch if support is on pace or above the projected levels in this progress chart. The timeframe may also be shortened or lengthened as needed before the public launch (See Appendix D for the projected size and number of gifts needed to achieve a \$2 million goal).



– **Recommendation #3: Define Gift Opportunities**

- Three primary endowment purposes are recommended to present to potential donors interested in creating a new endowed fund. The existing scholarship endowment option should be included in this campaign, with some recommended changes for all new funds.
- The other two options are intended to strengthen LISD's financial future by creating permanent revenue sources for core academic programs, student activities, and athletic team sports. These would all be labeled as "IMPACT Funds" to tie in with the proposed campaign theme of "Imagine Your Impact" and LISD's new strategic plan, Imagine 2030.
- **Option #1: IMPACT Funds (Districtwide)**
  - Provide a limited number of endowment designations that have an impact across the district rather than to just one school or program. For example, a significant number of potential donors during the external interviews expressed interest in creating endowed funds for Special Education and the TECC Centers.
  - Funds designated in this way would be unrestricted and available to be used by the program's lead administrator for their greatest needs from year-to-year. Sample namings include:
    - *Smith Family IMPACT Fund for Special Education*
    - *XYZ Corporation IMPACT Fund for LISD TECC Centers*
    - *Top Golf IMPACT Fund for LISD Golf Teams*
  - Funds designated to the TECC Centers may be especially appealing to local businesses and flexibility should be offered to create funds for specific TECC programs by businesses in those fields, such as Automotive Technology, Media Production, Pharmacy Tech, Culinary Arts, and HVAC.

- **Recommendation #3: Define Gift Opportunities (Continued)**
  - **Option #2: IMPACT Funds (School or Program Designation)**
    - For donors who wish to support one specific school or a program or activity within that school. Similar to Option #1, the administrative leader of that area would utilize the annual distribution from these funds for their greatest needs.
    - Sample namings include:
      - *Robert Wilson Memorial IMPACT Fund for Lewisville High School Band*
      - *Johnson Family IMPACT Fund for The Colony High School Women's Tennis*
      - *Julie Rodriguez IMPACT Fund for Marcus Marquettes*
      - *Flower Mound High School Class of 2001 IMPACT Fund*
      - *Kathleen Stevens IMPACT Fund for Hebron High School Library*
  - All IMPACT Funds in Options #1 and #2 require a minimum gift amount of \$10,000 and may be pledged over a maximum period of five years. Funds can also be established through planned gifts including bequest commitments, retirement beneficiary designations, and other forms of deferred giving.
  - All funds are established through a formal gift agreement signed by LEF and the donor.
  - For donor stewardship purposes, all IMPACT Fund donors will receive an annual endowment report from LEF documenting the fund's market value at the beginning and end of the fiscal year, any additions to the fund made during the past year, the amount distributed for the fund's purpose, and other financial details.

– **Recommendation #3: Define Gift Opportunities (Continued)**

– **Option #3: Student Scholarships**

- Given the longstanding tradition of scholarships awarded through LEF to graduating seniors, this giving option should be included in this campaign and all gifts for endowed scholarship purposes should be counted toward the campaign goal.
- To address the large number of scholarships awarding only \$500, it is recommended that the minimum amount to establish a new endowed scholarship after January 1, 2027 be raised to \$25,000. Based on LEF's spending policy, this will generate approximately \$800 to \$1,000 annually.
- All existing funds would be grandfathered and not required to be increased to this \$25,000 minimum. Campaign strategy should include approaching these donors to inform them about this policy for new funds and encouraging them to consider making additional gifts to their fund to allow for larger distributions to their scholarship recipient(s).
- Donors should still be allowed to create a scholarship for less than the \$25,000 minimum but clearly informed that this will be an expendable fund, and not a permanently endowed fund if the corpus does not reach \$25,000 within five years.
- No new scholarship funds should use "IMPACT Fund" in the formal name to maintain clear distinction between scholarship funds and IMPACT funds.

## – Recommendation #4: Volunteer Leadership Structure

- The success of this campaign will be heavily dependent on active volunteer leadership at multiple levels given the geographic scale of LISD and limited staff of LEF.
- The structure illustrated below includes a core steering committee comprised of LISD and LEF senior leadership and a small number of prominent leaders who can represent the interests of the entire district in addition to the schools in their own community.

---

### HONORARY CHAIR(S)

- Limit to 3 or 4 prominent community leaders

### *Role & Responsibilities*

- Mainly a ceremonial role.
- Serves as a highly-visible public endorsement of the campaign.

---

### EXECUTIVE COUNCIL

- Dr. Lori Rapp, LISD Superintendent
- Bill Lee, LEF Executive Director
- LISD Board Chair
- LEF Board Chair
- 2-4 Others (All should be lead donors)

### *Role & Responsibilities*

- Works directly with campaign consultant to establish priorities, mobilize staff and volunteer resources, participate in key proposals / solicitations, and monitor campaign progress.
- Meets quarterly including one annual meeting with all Leadership Councils.

---

### LEADERSHIP COUNCILS

- Appoint 8 to 15 individuals to represent each high school feeder pattern.
- High school principal serves as chair.



### *Role & Responsibilities*

- Works with Executive Council to achieve key campaign goals for the schools within their community.
- Collaborates with existing fundraising entities including PTAs, athletic boosters, and other student activity support groups to identify key needs that may be addressed through permanently endowed funds. Individuals from these groups will be encouraged to serve on their Leadership Council.
- Each council meets quarterly including an annual meeting with all Leadership Councils and Executive Council.

– **Recommendation #5: Coordinate Alumni Engagement**

- High school alumni networks represent a significant opportunity for LISD to build productive, long-term relationships with thousands of individuals here in North Texas, and beyond. More effort is required to organize engagement activities consistently across the five high schools.
- This coordination should start with each high school principal. AAP requests to meet with each principal within the next six months to assess their current engagement efforts. It is also recommended each high school should assign a staff delegate to work with AAP to develop and implement consistent engagement strategies across each high school.
- AAP recommends an initial focus on helping to facilitate special reunion years (10<sup>th</sup>, 25<sup>th</sup>, 50<sup>th</sup>, etc) as well as targeted efforts to engage specific alumni constituencies (band, dance, theater, sports teams, etc).
- While fundraising is not the primary purpose for engaging alumni, this campaign presents the opportunity to introduce creating an endowed fund as an opportunity for specific alumni groups.
- AAP can also assist in exploring the implementation of consistent usage of an alumni engagement platform across all five high schools. Sample platforms that focus on public K-12 alumni engagement include:
  - Almbase - [www.almbase.com](http://www.almbase.com)
  - alumniHUB - [www.alumnionline.net](http://www.alumnionline.net)
  - Alumnia - [alumnia.net](http://alumnia.net)
  - 360Alumni - [www.360alumni.com](http://www.360alumni.com)
  - AlumniSync - [www.alumnisync.com](http://www.alumnisync.com)

– **Recommendation #6: Increase LEF Staffing**

- Given the limited history of major gift fundraising, investments in new LEF staff positions are recommended to successfully undertake a large campaign.
- The recommended positions below are listed in priority order. Some of the functions of these roles may currently be performed by existing staff. These proposed positions are not intended to replace any current staff.

