Education Fund

Annual Report, June 2023

The League of Women Voters of Needham Education Fund (LWVN-EF), incorporated in March 2015, continues to focus on its educational mission of establishing programs to help people participate in their government.

Fiscal Year 2023 provided much more opportunity for in-person events, and it was good to gather together. However, the use of virtual options for meetings, as was necessary during the pandemic, has continued to some extent, enabling more to participate in certain circumstances. For example, our Candidates Night was hybrid, allowing for some to watch and submit questions from home.

Our voter service efforts provided information for three elections—the primary State election in September 2022, the general State election in November 2022, and the local election in April 2023. Information was provided through in-person events, virtual events, voter guides online and, to a limited extent, in hard copy. These efforts involved several members and provided information to those attending events, many real-time viewers, and website visitors. Once again, we reminded the community of our work through an award-winning float in the Needham Fourth of July Parade. Finally, building on our successful initial Civics Showcase in June 2022, we proceeded to plan our second such event, which was held June 10, 2023, at Powers Hall.

Our Needham High LWV Club's members continued their work of building voter awareness among potential newly eligible voters. They participated in our April program to inform Needham voters about the two local ballot questions. They also created their own information booklet about the November state ballot questions and created an inspiring video entitled "Why Voting Matters" that presented several elected officials' views on the importance of voting. More details on these and additional events are listed below.

All year, the use of our website and social media helped inform the public about our events and voter information in 34 new posts. In the past year, there were over 37,000 views. The all-time highest number of single day views for the LWVN website—3,693—was recorded this year on April 10, 2023 (Needham election day). We are especially grateful to the Needham Channel for recording and broadcasting our voter service events; those recordings were linked to our website.

We have begun reaching out to Town Meeting Members for contributions to add to the Education Fund. This is our first fundraising effort in several years, when we had skipped fundraising due to pandemic-related economic hardship.

Part I: Activities – Programs and Projects 2022-2023

Educational Programs

- Held a LWV-Needham book discussion via Zoom videoconferencing on Gloria Steinem's *My Life on the Road* (March 22).
- Our earlier Meatless Monday Needham program, which encouraged eating less meat, was prominently featured in a report from the Swette Center for Sustainable Food Systems at Arizona State University. "Meatless Monday Best Practices: Assessing the Implementation and Maintenance of Meatless Monday Initiatives in the U.S.," published in June 2022.
- Our recording of the 2022 workshop "How to Run for Office and Town Meeting" was available on the LWVN website; the companion guide was updated and available on the LWVN website. Produced a public service announcement encouraging citizens to run for office.

State Primary (September 6) and General Election (November 8)

- Produced a Candidate Forum on Zoom with candidates for State Senate general election.
- Produced a Candidate Forum on Zoom for County Commissioner for both primary and general election.
- Forums were streamed live on Needham Channel and were available for later viewing on Needham Channel and LWV-Needham websites.
- Posted the VOTE411 statewide voter guide for the primary and general elections, with candidate responses for state and county offices.
- LWV-Needham, with other MA Leagues, produced a ballot question forum for Questions 2 and 3.
- Prepared seven short videos for each election for public service announcements that encouraged informed voting.
- Prepared voter information for and discussed it with attendees at the fall Needham Harvest Fair.

Needham Local Election (April 11)

- Produced two Voter Guides with information about and responses on priorities from town-wide candidates and Town Meeting Member candidates; available on our website. Hard copies of the town-wide guide distributed at the Senior Center and the Library.
- Held televised forum on local ballot questions. Streamed live on Needham Channel and available for later viewing on websites.
- Held Candidates Night at Broadmeadow School (hybrid), with forums for the two contested races (Select Board and Planning Board). In addition, it included "Meet the Candidates," introduction of uncontested positions, and introduction of Town Meeting Member candidates. Streamed and shown on the Needham Channel and recording posted on LWVN and Needham Channel websites.
- Prepared seven video public service announcements to encourage informed voting.

Town Meeting 2023

- Held New Town Meeting Member Orientation (April 24).
- Organized and led Town Meeting Warrant Meetings (April 24) in person and on Zoom.

Town Meeting Member 25-Year Awards

- Presented awards to three Town Meeting Members for 25 years of service prior to the May 8 Town Meeting.
- The Melick Foundation provided the LWVN Ed Fund an additional $2,900 to continue this activity for the long-term, making their total contribution $7,900.

Diversity, Equity, and Inclusion

- Presented at Needham Diversity Summit (November 6) on “Power Through Advocacy”.
- Participated in LWVMA quarterly DEI Peer Discussions.

Grants, Donations, and other income

- Received donations of $450 to the Education Fund (unsolicited, from 2 donors).
- Income from the endowment fund in FY 2023 has been reinvested.

Civics Education for NHS 11th Graders and NHS Scholarship

- Produced Student Advocacy Guide and eight companion videos on advocacy at state and local level; all available on the website. Shared with other leagues in MA.
- League members Cathy Dowd and Karen Price hosted a session at the 2023 Massachusetts Civic Learning Week (March 3) titled “Teaching Civics Through Advocacy for Bills” before the Massachusetts Legislature, focusing on the successful community and school collaboration for the 2022 Civics Showcase. Karen also presented our showcase experience at a LWVMA workshop for local Leagues.
- In June, Eileen Mullen and Karen Price served as Community Advisors at the MA Department of Elementary and Secondary Education's first statewide Civics Showcase held at Clark University. They spoke with student presenters and evaluated their projects.
- Planned Civics Showcase (June 10) as venue for students to present their advocacy projects at Powers Hall for government officials and the public. About 100 students participated, and over 100 members of the public, including elected officials, attended.
- Awarded Needham High School Scholarship to a graduating senior in June 2022, and will be awarding a scholarship again to a June 2023 Needham High graduate.

Special Expenses

- Costs of framed certificates for 25-year TMM awards ($106.19); offset by funds from Melick Foundation.
- Zoom add-on for one month of webinar capacity of 500 ($83.94) to hold hybrid Candidates Night.
- Civics Showcase – estimated expenses will be offset by earlier Roche Bros. grant.

Part 2: Finances

League of Women Voters - Needham - Educational Fund Balance Sheet
As of May 31, 2023

ASSETS		
	Checking/Savings	
	Vanguard Account	24,838.24
	Needham Bank	11,949.74
	Paypal Account	-
		36,787.98
	Accounts Receivable	**0.00**
TOTAL ASSETS		**36,787.98**
LIABILITY & EQUITY		
	Liabilities	
	Accounts Payable - to LWV-N	406.40
	Grant - Melick for 25 yr TMM	7,537.18
	Civics Bee prepaid grant	500.00
	Total Liability	**8,443.58**
EQUITY		
	Perm.Restricted Net Assets (endowment)	23,199.64
	Unrealized Gain – Vanguard	
	Restricted endowment earnings (Vanguard)	1,638.60
1	Retained Earnings	4,040.21
	Net Income	(534.05)
		28,344.40
TOTAL LIABILITIES & EQUITY		**36,787.98**

Assets

The endowment, the "Needham LWV Endowment for Civic Awareness, Education, and Engagement" is currently invested in three Vanguard funds. The endowment has increased significantly in value from its original $12,644 in September 2016, but dropped slightly in the last 12 months as shown in the table below.

Vanguard Investment Value – Original & Last 3 Years

As of	Value	Annual Increase	Annual Increase (%)
Original (Sept. 2016)	$12,644		
May 2021	24,501		
May 2022	24,909	$408	1.66%
May 2023	24,838	-71	-0.28%

For the endowment's first three years, the earnings on the endowment were reinvested. The Board decided to reinvest the earnings in fiscal year 2022 and 2023. It will continue to decide yearly whether to reinvest.

There is $11,950 in the checking account as of May 31, 2023, which includes $7,537 from the Melick Foundation to cover future Town Meeting Member 25-year awards. The checking account is funded by individual and business donations, income from sales and events, and grants over the past five years.

Equity

Restricted equity includes the endowment and its dividends. Retained earnings and net income represent funds raised in the prior and current fiscal years that can be spent at the discretion of the Board for LWVN-EF programs.

FY2024 Budget

The Board-approved LWVN-EF budget for the upcoming fiscal year (July 1, 2023-June 30, 2024) is below.

Fiscal Year 2024 LWVN-Ed Fund Budget

FY 2024 LEAGUE OF WOMENS VOTERS OF NEEDHAM - EDUCATION FUND BUDGET

EDUCATION FUND BUDGET	FY24 BUD	*FY23 Actual thru 4/30/23*	FY23 BUD	*FY22 Actual*
INCOME				
INVESTMENT INCOME	$0	*$0*	$0	*$0*
CONTRIBUTIONS	$1,200	*$450*	$1,200	*$1,339*
GRANTS	$975	*$0*	$900	*$300*
TOTAL INCOME	$2,175	*$450*	$2,100	*$1,639*
EXPENSE				
ADMINISTRATIVE*	$608	*$460*	$643	*$506*
FUNDRAISING	$30		$50	
STUDIES	$25		$25	
SCHOLARSHIPS	$500		$500	*$500*
PUBLIC FORUMS	$920	*$541*	$940	*$906*
VOTERS' SERVICE	$344	*$0*	$450	*$219*
TOTAL EXPENSE	$2,427	*$1,001*	$2,608	*$2,132*
NET INCOME	($252)	*($551)*	($508)	*($493)*
** Expenses shared 50/50 with LWVN Budget*				

FY 2023 LWVN-EF Board

Carol Patey, President
Elizabeth Handler, Clerk
Kara Holmquist, Director
Karen Zarrow, Treasurer
Harriet Goldin, Director
Off Board: Budget Chair, Erica Bond

The LWV-Needham Board of Directors appoints the Ed Fund Board Directors. The President and Treasurer are members by virtue of their LWV-Needham offices.