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Hutto Education Foundation Supporter

Hutto Education Foundation Endowment Update

Funding Update and Request for 2021-2022

Endowment History

- HEF was established in 2006. Our mission is to partner with Hutto ISD to enrich, enhance, and maximize the quality of education by providing grants & scholarships to teachers, staff and students.
- The Solid Waste Founding Agreement with WILCO was established in 2011. Since 2015, all funds donated have gone to our Endowment Fund.
- Commissioner Ron Morrison was an ardent supporter of higher education. His goal was to see our organization grow our endowment to \$1 million to provide a forever fund providing scholarships to students in Hutto ISD. Will you help us get to \$2 million?

Scholarships for HHS Seniors

Endowment: The goal of this endowment is to invest the funds to generate scholarships for our students to attend 2-year, 4-year college or university or an accredited technical school. We have established that endowment and made progress with nine years of deposits.

2020-2021 School Year:

HEF funded 18 Hutto High School graduating senior scholarships at \$20,000, 3 returning scholarship recipients at \$5,000.

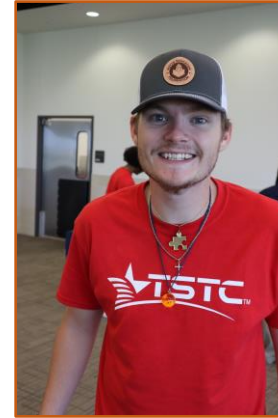


HEF/TSTC Scholarships

2020-2021 School Year:

HEF funded \$6,000 in a 1:1 match scholarship program with TSTC. We hosted a breakfast in the Summer for the scholarship presentation and awarded the Fall semester scholarships on campus.

This scholarship is available to Hutto ISD graduates entering into their 3rd & 4th semesters at Texas State Technical College and are in good academic standing.



HEF Endowment Management

- This year, we put out an RFI for a more robust Investment Management firm. The HEF Endowment Oversight Committee was impressed with the overall customer experience and reporting capabilities with First Financial Trust. We moved our accounts to FFT in April 2021.
- \$3,500 is being used for the audit every 2 years.
- Up to 10% of the funds collected in excess of the Minimum Annual Investment Amount will be put towards the partnership with higher education center in Education Service Center Regions XII & XIII
- HEF and TSTC meet monthly to discuss the ongoing partnership and programming opportunities and challenges
- HEF is currently developing a relationship with Temple College for a similarly structured program as with TSTC

HEF Endowment Fund Overview

Initial Contribution	\$20,000
November 2011	\$22,500
December 2012	\$26,250
June 2014	\$87,000
October 2015	\$86,500
October 2016	\$91,500
December 2017	\$146,500
December 2018	\$146,500
December 2019	\$166,500
October 2020	\$175,000
<hr/> TOTAL CONTRIBUTIONS	<hr/> \$968,250



HEF Endowment Monthly Summary

Sep-21	Initial Investment	Beg Balance	Interest/Dividend	M/V Change	Fees	Cont/With	Ending Balance	% Monthly Change
FFT	\$ 1,199,059.05	\$ 1,264,336.39	\$ 2,059.30	(\$41,400.13)	(\$956.00)	(\$1,000.00)	\$ 1,223,039.56	-3.29%
HEF Endowment	\$ 964,750.00	\$ 995,594.27	\$ 1,592.42	(\$33,392.08)	(\$735.24)	\$0.00	\$ 963,059.37	-3.38%
HEF Agency	\$ 154,309.05	\$ 179,283.14	\$ 269.20	(\$5,532.94)	(\$138.62)	(\$1,000.00)	\$ 172,880.78	-3.11%
HEF LTS	\$ 77,000.00	\$ 86,137.48	\$ 187.81	(\$2,322.78)	(\$71.40)	\$0.00	\$ 83,931.11	-2.63%
Rotary Foundation	\$ 3,000.00	\$ 3,321.50	\$ 9.87	(\$152.33)	(\$10.74)	\$0.00	\$ 3,168.30	-4.84%

Aug-21	Initial Investment	Beg Balance	Interest/Dividend	M/V Change	Fees	Cont/With	Ending Balance	% Monthly Change
FFT	\$ 1,199,059.05	\$ 1,243,879.10	\$ 948.21	\$ 20,463.18	(\$954.10)	\$0.00	\$ 1,264,336.39	1.62%
HEF Endowment	\$ 964,750.00	\$ 979,038.51	\$ 768.64	\$16,520.16	(\$733.04)	\$0.00	\$ 995,594.27	1.66%
HEF Agency	\$ 154,309.05	\$ 176,541.96	\$ 125.60	\$2,754.47	(\$138.89)	\$0.00	\$ 179,283.14	1.53%
HEF LTS	\$ 77,000.00	\$ 85,052.35	\$ 53.97	\$1,102.58	(\$71.42)	\$0.00	\$ 86,137.48	1.26%
Rotary Foundation	\$ 3,000.00	\$ 3,246.28	\$ -	\$ 85.97	(\$10.75)	\$0.00	\$ 3,321.50	2.26%

Jul-21	Initial Investment	Beg Balance	Interest/Dividend	M/V Change	Fees	Cont/With	Ending Balance	% Monthly Change
FFT	\$ 1,218,059.05	\$ 1,256,256.83	\$ 854.71	\$ 16,715.63	(\$948.07)	(\$29,000.00)	\$ 1,243,879.10	1.31%
HEF Endowment	\$ 964,750.00	\$ 975,020.49	\$ 694.54	\$ 14,051.65	(\$728.17)	(\$10,000.00)	\$ 979,038.51	1.42%
HEF Agency	\$ 173,309.05	\$ 193,981.43	\$ 109.32	\$ 1,589.43	(\$138.22)	(\$19,000.00)	\$ 176,541.96	0.80%
HEF LTS	\$ 77,000.00	\$ 84,057.80	\$ 50.85	\$ 1,014.67	(\$70.97)	\$0.00	\$ 85,052.35	1.17%
Rotary Foundation	\$ 3,000.00	\$ 3,197.11	\$ -	\$ 59.88	(\$10.71)	\$0.00	\$ 3,246.28	1.51%

HEF Fund Request

Hutto Education Foundation is requesting \$200,000 for 2021-2022

HEF's GOAL

- To have perpetual scholarship funds that will impact Hutto ISD students forever
- To have the ability to continue providing opportunities to students & faculty members at the same rate our community is growing
- To continue shaping and nurturing the partnerships with East Williamson County Higher Education Center – TSTC and Temple College – for our Hutto ISD graduates
- If the request is funded, we'll host our "Million Dollar Party" to celebrate the Endowment Basis surpassing the million dollar mark that Ron Morrison had in mind. We'd love to celebrate with YOU as you have been instrumental in getting us to where we are today.

Other HEF Programs

Along with our Annual Corporate Partners, Employee Giving Campaign and support from Friends, Family and Community members, HEF's programs are thriving and supporting the innovation that makes Hippo Nation a leading district.

Excellence In Education Teacher and Faculty Grants:

This year, HEF awarded 32 innovative grants totaling \$109,250.

Student IMPACT Grants:

This year, HEF plans to award \$4,500 for student driven grants.

