



# Endowment Manual

Global Teachers Fellowship

This manual serves as a resource for parties interested in creating an endowment for an existing program. The processes described within this document were developed and applied to the creation of the Go Global NC Global Teachers Fellowship.

## Table of Contents

Table of Contents.....	1
1. Manual Introduction.....	2
2. Purpose of this Manual.....	3
3. Building the Team – Champions for the Cause .....	4
4. Making the Case - Getting Started .....	6
5. Game Changer – the Case Statement .....	7
6. Conveying the Message - Developing Outreach Materials .....	9
7. Growing The Support – Constructing the Campaign Cabinet .....	10
8. Fundraising - The Nuts and Bolts to Building an Endowment.....	11
9. Governance – Policies and Procedures for an Endowment .....	12
10. Appendices.....	13
A. Five-Year Timeline.....	13
B. County Map.....	15
C. Cabinet Member Job Description .....	16
D. Cabinet Member Pledge Form.....	17
E. Fundraising Progress Template .....	18
F. Master Prospect List .....	19
G. Case Statement .....	20
H. Fellowship Tri-fold .....	55
I. Fellowship Flyer .....	56

## 1. Manual Introduction

Introduction: This manual is designed to serve as a resource for parties interested in creating an endowment for an existing program. The processes described within this document were developed and applied to the creation of the Go Global NC Global Teachers Fellowship (Fellowship). The Fellowship sought to raise \$10 million over 5 years in order to assure that each year a teacher from every one of North Carolina's 100 counties will have the opportunity to participate in the Go Global NC Global Teachers Program.

The Go Global NC Global Teachers Program: Go Global NC's Global Teachers programs are designed to provide K-12 teachers from across North Carolina with an in-depth learning experience about the history, culture, and environment of other countries. Programs begin with an intense orientation workshop, followed by an approximate 10-day international immersive learning experience abroad. Several weeks after travel, Go Global NC leads an action-planning workshop, which creates a platform for collaboration and creativity to ensure teachers are prepared to share their global experiences in their own North Carolina classrooms.

Go Global NC has been providing experiential learning opportunities to help educators bring the world to North Carolina classrooms since 1991. Teachers from all grade levels and all subject areas use their new global experiences to ignite an interest in global engagement and cooperation among their students.

## 2. Purpose of this Manual

Purpose: To provide a “**how to**” guide on building an endowment to support global education programming for teachers

Before you begin: The undertaking of creating an endowment is by no means a small feat. Great consideration and forethought must be dedicated at the start of the planning process in order to ensure: 1) an endowment is the correct fit for your program; 2) the correct leadership is in place to guide the process; and 3) the staff resources exist to support the endeavor.

Endowments will vary on size, geographic region, purpose, and amounts. For the purpose of our endowment, we created a structure to span the state of North Carolina, more specifically each of the 100 counties were tasked with raising funds to support one teacher from each county. The specific reach of each endowment should inform the approach and design of the materials developed to support the effort.

Is an endowment the correct fit for your program? Our original intention was to bring an existing program to scale. Over the course of several exploratory discussions, the consideration of an endowment began to take form. The creation of an endowment would allow us to scale our program and identify sustained funding along the way. As we entertained the possibility of creating an endowment, several questions arose, requiring us to reaffirm our commitment along the way. Some questions you may consider with your team are:

- ❖ Is there appropriate **LEADERSHIP** to spearhead this initiative? Do you have someone who will serve as “the champion”?
- ❖ Is there **SUPPORT** from internal and external leadership (e.g., Board of Advisors, funders)?
- ❖ Are there **STAFF RESOURCES** available? Is there internal capacity that can be leveraged?
- ❖ Is the **PROGRAM REFINED AND READY TO BE SCALED**? Do you know the impact of your program? Does your program align with other initiatives?
- ❖ Do you have the resources and skill sets to create **OUTREACH MATERIALS** and get the message out to support your goal?
- ❖ Do you have the **FINANCIAL EXPERTISE** to lead a large-scale fundraising effort?
- ❖ Do you have the **FUNDRAISING EXPERTISE** to lead a large-scale fundraising effort?
- ❖ Do you have the **LEGAL EXPERTISE** who can help develop governance practices to ensure stewardship?
- ❖ Do you have additional **INDEPENDENT SOURCES FOR FINANCIAL SUPPORT** that do not compete with your organization’s ability to raise and support existing programs and funding?

### 3. Building the Team – Champions for the Cause

Leadership: The Fellowship builds on almost thirty years of existing programming. These formative years provided the Fellowship the opportunity to be well known across the state of North Carolina. Previous annual programs allowed for staff experience, program development and refined program materials (e.g., program goals, model, evaluation, recruitment and follow up). The existing programming also built a network of supporters across the state, including program alumni, previous funders, and experienced staff,

Another key element to the success of our Fellowship was the participation and dedication of a board member as project lead during the formation of the work. The leadership provided by the board member paved the way for gaining support and resources to build the endowment. The board member served as “the champion” for the undertaking, both in conveying the vision and opportunity to make the endowment a reality, as well as by identifying additional resources for staffing and programmatic funding.

Board of Advisors: The participation of the Board member assisted with gaining the support and oversight of the full board of advisors. Ultimately, the board of advisors hold accountability for the organization, and their support of an endeavor as such, cannot be underestimated. The board of advisors role includes the creation and approval of several policy and procedures (see “Governance – Policies and Procedures for an Endowment” section).

Campaign Advisory Committee: This working group consisted of statewide educational leaders, board members, and program staff. Their role was to develop the conceptual framework and create the Case Statement. It is important to note that this team did not include fundraisers – they were subject matter experts and helped ensure that the educational program was sound and ready to scale.

Campaign Cabinet: The campaign cabinet was recruited to raise funds for the endowment. Members include current and former board members and external community leaders with a record of accomplishment in fundraising. The cabinet holds monthly meetings rotating between in person and video conference calls. Meetings are dedicated to developing donor prospects. Between the meetings, members solicit contributions. Campaign Cabinet members provide visibility, solicitations, and support for the campaign.

Staff Resources: The creation and support of an endowment includes several daily managerial responsibilities, including programmatic logistics, program management, recruitment of recipients for the endowment, and a multitude of fundraising activities. Our efforts relied on two primarily internal teams to address these demands, including working with the existing internal program planning team and the internal fundraising team. See appendix “Staff Responsibilities” for additional information.

- Internal Program Planning Team – The internal program planning team is dedicated to overseeing the existing program, including ongoing program logistics. Given that our endowment was designed to support an existing program, our staff had to oversee daily

program operations, as well as provide resources and support for growing the program to reach the endowment goals. This team consisted of the Senior Director of Programs, the Director for Education, and the Program Manager for Education. This team held weekly meetings to design, develop and implement the Global Teachers programs, including increasing the number of annual programs as the project became successful in scaling up.

- Internal Strategy for Fundraising Team – The internal strategy for fundraising team is dedicated to overseeing the progress of setting and reaching fundraising goals, including identifying and tracking prospective donors. In addition, the internal fundraising team focuses on tracking fundraising efforts, updating fundraising materials, and ensuring that the programmatic and fundraising goals remain in alignment. The internal strategy for fundraising team consists of the Development Director, an external fundraising consultant, a program assistant, the board champion, Senior Director of Programs, Program Director and Program Manager. This team holds full staff monthly video conference calls, as well as one to one check-ins on an as needed basis. This team differs from the campaign cabinet in that it oversees the day to day tracking and management of fundraising and the fundraising strategy. It was created to ensure that all parties (i.e., staff, board, campaign cabinet) maintained close dialogue on prospective, current, and past donors and potential donors. See appendix A: “Five Year Timeline” for additional information.

<b>Table 1. Timeline of Endowment Teams and Responsibilities by Year.</b>			
<i>Team</i>		<i>Planning</i>	<i>Years 1 - 5</i>
External	1. Board of Advisors	Approval of policies and procedures	Oversight
	2. Campaign Advisory Committee	- Develop the conceptual framework - Create the Case Statement	
	3. Campaign Cabinet		Raise funds
Internal	4. Internal Program Planning Team	Program logistics	
	5. Internal Strategy for Fundraising Team	Oversight of fundraising goals, including identifying and tracking prospective donors	

#### 4. Making the Case - Getting Started

Defining the Need & Understanding the Impact: One of the most frequent questions our staff received as we started this process to create an endowment is **WHY**, *why does your program merit the funds and resources to be sustained in perpetuity?* In order to provide a comprehensive response to this aptly posed question, we conducted a systematic program impact analysis.

Conducting a Program Impact Analysis – Go Global NC conducted a Global Teacher Outreach Survey in to learn more about how participation in the Global Teacher program impacted teachers, classrooms and students. The survey consisted of fifteen sections addressing participant cohort; impact on teacher, classroom, and student; changes to curriculum; overall impact; knowledge of Global Teacher Program; benefits and challenges from Global Teachers Program; interest in Alumni Global Teachers Program; willingness to participate in additional follow up; and an opportunity for additional comments.

In addition to the survey, we held in-depth interviews with almost forty alumni to explore their experiences and the impact of the program on teaching style, classrooms, students and their communities. The interview topics included gathering a better understanding on the primary reason for participation in Global Teacher Program; their most vivid memory of the program; illustrative examples of the impact on teacher, classroom, and student; and potential messages to future supporters.

The survey and the in-depth interviews provided the quantitative and qualitative foundation for constructing our message and making the Case Statement for the endowment.

Alignment with other Statewide Initiatives: our endowment aligned with the NC State Board of Education's NC Global Educator Digital Badge (GEDB). GEDB is a micro-credential established in 2014 by the NC State Board of Education as an Action Item of one of their five Global Commitments. It recognizes educators who have participated in 100 hours of global professional development and designed/implemented a Capstone Project-- a curriculum instructional unit based on their state content standards and global competencies. This is a distinguished honor vetted by the North Carolina Department of Public Instruction, including state, district, and school-level review processes.

## 5. Game Changer – the Case Statement

Perhaps the most significant document developed to support the endowment, was the “Case Statement”. The Case Statement provided a comprehensive, clean, externally facing document that provided a foundation and common understanding of the goal and purpose of the endowment. The creation of the case statement was a lengthy process that provided the opportunity for staff, state-wide educational leaders, and leadership to take a hard look at our process and our intention to grow. Throughout the creation of the Case Statement, staff and leadership were able to consolidate and refine our messaging and our goals, resulting in a streamlined purpose and focus for the endowment. See Case Statement in the appendix G for additional information.

### Case Statement Sections

**Meeting the Need.** In order to succeed in an arena with competing demands and requests for funding, we had to identify the need for our program. Including what benefit were we providing, we framed our need statement on three levels: Worldwide, National, and State. In addition to the need, we highlighted our team’s unique positioning, skill set and expertise in addressing this need, including our connections and alignment with other federal, state and regional initiatives.

**How the Fellowship Works.** We provided a summary of the selection process for Fellows and Countries, including our focus on counties with limited resources. In addition, we provided a brief overview of the timeline, requirements, and deliverables of the Global Teachers Fellowship.

**What is the Impact? Making a Difference in our Teachers, Students, and Communities.** One of the most valuable aspects of the Case Statement is the ability to provide specific, qualitative responses to the frequent question “What is the impact of your program”. Building from our program impact analysis, we identified seven areas of impact. For each of the identified areas of impact we provided a summary of the relevance of the finding, supporting statistics, and an illustrative quote from program alumni that demonstrates the impact.

In addition to the teachers themselves, we highlighted how the teacher’s experience and participation in the Global Teachers Program directly impacts others in what we called “The Ripple Effect”. Our participants have a direct impact on students, parents, school administrators, principals, and superintendents, community members, policy leaders and business leaders.



**The Numbers.** The last section of our Case Statement was dedicated to highlighting the needs and resources in order to support the endowment. We created four sections, including: Cost Model by the Numbers; Fundraising Model; Staffing; and Fund Management.

**How You Can Help.** The Case Statement was developed to provide a common foundation to start the discussion. The last section of the Case Statement included additional information for interested parties to *continue* the discussion.

Final Sign Off – Approval from the Campaign Advisory Committee: With the near final Case Statement in hand, leadership held a variety of meetings with statewide leaders and foundations to ensure that the document addressed essential information that they would request if solicited for endowment support. This process served two fold: 1) it verified the comprehensiveness of the document; and 2) it provided additional opportunities to gather buy-in and interest from relevant parties across the state.

## 6. Conveying the Message - Developing Outreach Materials

The creation of the Case Statement provided the opportunity to create supporting outreach materials. All outreach materials aligned with the messaging and information presented in the Case Statement. Additional materials were designed to cater to different audiences and needs. For example, not all interested parties would want to read the full Case Statement in its entirety. Smaller, more readily digestible materials such as the flyer and tri-fold were created to serve these needs. Outreach material included:

Website ([www.gtfellowship.info](http://www.gtfellowship.info)): The online website was designed to serve as a mirror reference for the Case Statement. The website was created to allow external audiences the opportunity to see a foundational overview of the Fellowship in advance of meetings.

Fellowship Tri-fold: This condensed “leave behind” document provides high-level summary information. This document is pulled from information included in the case statement and includes access points to additional information for interested parties. The Tri-fold includes summaries on the fellowship goals, the role of Go Global NC, quotes from previous participants, a condensed program process, program impact, information about how you can help, and contact information. See appendix H.

Fellowship Flyer: This condensed “leave behind” document provides information in a digestible fashion to stimulate a potential donor’s interest. This document pulls from the Case Statement and provides an overview of “who we are”; information about the program; information on the goals, process and impact; inspirational quotes and information about how you can help the campaign. See appendix I.

Presentation PowerPoint: This file pulls information from the Case Statement and provides a template for staff and cabinet members to present Fellowship information to a large audience.

Solicitation Speaking Bullets: These documents were created to support this endeavor. One provides a draft agenda for endowment fundraisers to use during a potential donor pitch meeting. Includes purpose, vision, fiscal amount, and request for additional potential donors. The second document created was at a very detailed level and was created for major gift asks. The second document provides a detailed line by line, bullet by bullet outline of Fellowship’s selling points, including meeting set-up with soaring vision and credentialing us; Current status – of fellowship; and setting the stage for making the ask.

County Map: This document provides a visual reference for counties that have current grant funding, secured endowment funding, or are currently soliciting funding. See appendix B.

## 7. Growing the Support – Constructing the Campaign Cabinet

The publication of the Case Statement provided the opportunity to reach wider audiences and grow momentum for the endowment. The Case Statement redefined the need and role of the Campaign Cabinet. In order to manage the Campaign Cabinet and recruit fully committed members, the internal program team created the following documents:

Cabinet Member Job Description: This document outlines the roles and responsibilities for interested cabinet members. The form was used as a recruitment tool for cabinet members in advance of participation on the cabinet, allowing cabinet members to fully understand what their participation would entail, and be fully engaged. See appendix C.

Cabinet Member Pledge Form: All cabinet members were encouraged to support the initiative through a fiscal contribution to the Fellowship. This document provided a straightforward request to Cabinet members to provide a direct pledge to the Fellowship. See appendix D.

Annual Cabinet Meeting Schedule: This document provides the cabinet members with an overview of meetings at least one year in advance. Meetings are on a monthly basis, rotating between in-person and video conference calls.

## 8. Fundraising - The Nuts and Bolts to Building an Endowment

Fundraising is the primary component to starting an endowment. A systematic structure for receiving, managing, and tracking monetary resources should be in place well in advance of receiving the first donation. There are several methods that can be applied to help reach fundraising goals, including annual giving, endowment giving, and planned giving (see the How You Can Help section of the Case Statement for how we approached fundraising). The development and finance committee of the board, fundraisers on contract, and staff developed and tracked the following documents to assist in the day-to-day management of pursuing and receiving funds.

Fundraising Progress: This document is designed to track progress on fundraising, includes tracking for: Donor Database ID #; Donor Name; Additional Attributed Donor; Anonymous Gift (Y/N); Gift/Pledge Amount; Type (Outright Gift or Pledge); County; Gift/Pledge Date; Amount Paid; Pledge Balance; Payment Reminders; Number of payments; Frequency; Payment 1 Due Date; Payment 1 Amount Due; Payment 1 Reminder Sent; Payment 1 Amount Paid; Payment 1 Date Paid. This document also provides a summary of progress by county and percent to goal. See appendix E.

Master Prospect List: This is a working document that provides names, contact information, suggested ask amounts, and ongoing notes for communication and engagement. Prospects are presented for the following groups: individuals, corporations, international companies in NC, foundations, Local government and districts, and prospective cabinet members. See appendix F.

Naming and Sponsorship Opportunities: This document provides options for naming recognition to different components of the Fellowship to funders based on amount contributed.

Stewardship Process for Endowment Donors: This document provides a timeframe to follow up with donors to show appreciation and planning for continued relationship building. This document is an intentional plan for thanking and recognizing donors.

Request for Proposals for Portfolio Management and Financial Advisory Services: This document provides a brief overview of the Fellowship and outlines the request for interested parties to submit an application for consideration to manage the portfolio. For our purposes, we anticipate managing funds for 100 counties; therefore, it is essential that the structure be in place to allow the ability to track funds on a county-by-county basis.

## 9. Governance – Policies and Procedures for an Endowment

Several policies and procedures were developed in order for the board of advisors to provide proper oversight for the endowment. To ensure the safety, integrity and appropriate management of funds, the development committee created the following forms, policies and guidelines.

Commitment Intent Form: This document is a simple straightforward worksheet for donors to complete that provides: donor contact information, total commitment amount, options to pay in full or to pledge for payment. Pledges may be provided on an annual, semi-annual, quarterly, monthly or custom basis.

Council Fundraising Policies: The goal of the fund development & gift acceptance policy is to uniformly treat donors and their gifts with full disclosure and provide guidelines for the acceptance and stewardship of gifts. The provisions of this policy apply to all gifts received by the Council for any of its programs or services. Specific gifts are considered on their merits and final action is taken on those as authorized by the Council's Board of Directors.

Endowed Gift Agreement: This document provides an example template for an endowed gift agreement, including the gift, fund purpose, administration of fund, required minimum funding, governing law, signatories, and donor legacy.

Gift Acceptance Policy: This document will protect the interests of Go Global NC Council, Inc. and the persons and other entities that support its programs, these policies were designed to assure that all gifts to, or for the use of, Go Global NC are structured to provide maximum benefits to both parties. This document focuses on both current and deferred gifts, with special emphasis on various types of deferred gifts and gifts of non-cash property.

Investment Policy Guideline: The purpose of this Investment Policy Guideline is to assist Go Global NC and their selected advisor, regarding investment objectives, goals and guidelines for the client's total portfolio. The Portfolio refers to assets available for investment with the advisor's company. This IPG is to be viewed as a guideline rather than a rigid statement of policy from which there can be no deviation. The Client should review this document periodically to ensure that it adequately reflects changes in the Portfolio's investment goals and objectives. Any material modifications to the Client's information or financial circumstances should be discussed promptly with the Client's Financial Advisor and communicated in writing on a timely basis to all interested parties.

Acknowledgement Letter for Donors: This document is a letter designed to acknowledge donors who have provided support for the endowment.

## 10. Appendices

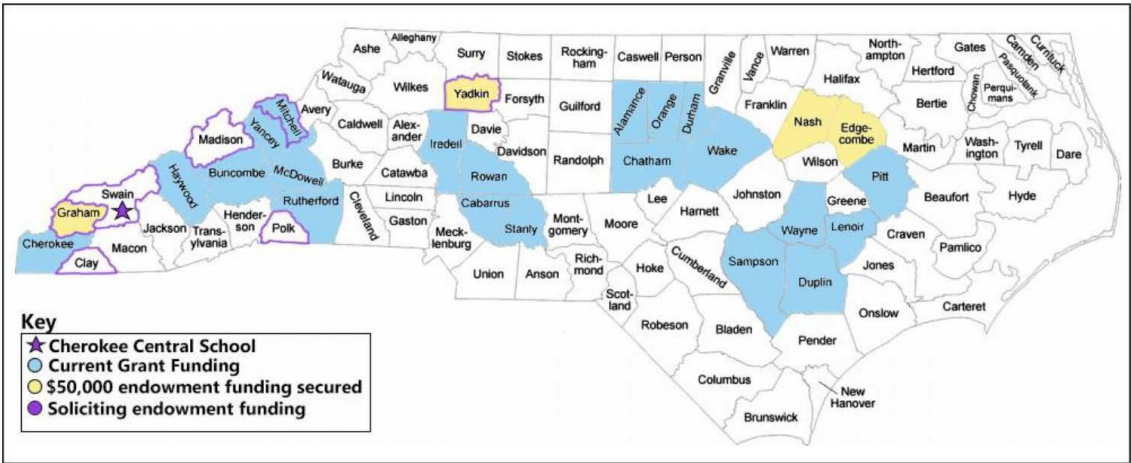
## A. Five-Year Timeline

Year	Task	Who	Date	Status
2018	Build Organizational Buy-in and Test Leadership support			
	Approve Campaign budget			
	Finalize Cabinet roles & responsibilities			
	Board of Advisor vote on gift acceptance policies			
	Decide on financial holding institution and create investment policies			
	Length of pledges accepted (3 to 5 years)			
	Create donation pledge form			
	Create gift processing guidelines and acknowledgement and stewardship procedures			
	Update and print Executive Summary of Case Statement			
	Raise program funding			
	Create prospect list and rank by interest and capacity			
	Quiet Phase planning			
	Finalize county applications			
	Create talking points for Board and Campaign Cabinet			
	Create script for Cabinet member training			
	Explore large potential donors			
	Present strategy to Board			
2019	Assign a County to each Board member to raise money			
	Recruit Campaign Chair and Cabinet Members			
	Solicit Cabinet gifts			
	Set financial goals for each year of campaign using gift range chart and ranking of prospects			
	Create ongoing educational program for Cabinet members to learn and keep engaged			
	Invite all Cabinet members to participate on an annual program			
	Ask Board Treasurer to be Ad Hoc member of Cabinet to ensure financial transparency			
	Hold Kick Off Cabinet Meeting and Training			
	Partner with local media outlets to create a promotional video			
	Research and identify relationships with Campaign prospects then rate prospects			
	Update case statement to include Cabinet roster and any new partners, donors			
	Solicit prospects in Quiet Phase of campaign			
	Hold GGNC Council 100% participation campaign			
	Hold additional Cabinet meetings throughout the year			
	Track solicitations, pledges in, acknowledgements and stewardship of quiet phase donors			
	Solicit Global Teachers Advisory Council members			

Year	Task	Who	Date	Status
2020	When 70% of \$10M goal is met (\$7M) – start public phase of campaign			
	Hold Cabinet Meetings			
	Research and identify relationships with additional Campaign prospects then rate prospects by passion and wealth indications			
	Update case statement			
	Ready public phase marketing and communications plan			
	Solicit Tier 3 prospects			
	Send letter from Millie and Rick to all prospects not being solicited by Cabinet			
2021	Create communications plan for public phase			
	Event to recognize quiet phase donors			
	Make quiet phase donors face of public phase			
	Use university liaisons created in ground phase			
	Implement public phase communications plan			
	Hold Cabinet Meetings			
	Research and identify Relationships with additional Campaign prospects then rate prospects by passion and wealth indications			
	Update case statement to include Cabinet roster and any new partners, donors			
	Solicit any remaining prospects in quiet phase if applicable			
	Launch public phase of campaign including direct mail, matching gift sub-campaigns, teacher alumni campaign, implement marketing plan, website unveiled, etc.			
	Hold Cabinet Meetings			
2022	Update case statement to include Cabinet roster and any new partners, donors			
	Ensure pledges are paid to date			
	Stewardship plan created and implemented			
	Hold campaign celebration			
2023	Recognize all donors			
	Recognize all Cabinet members			
	Recognize everyone involved in campaign from ground up			
	Implement reporting structure to all endowment donors annually sharing impact and measured successes			
	Renew paid campaign donors turning them into annual donors			

B. County Map

Global Teachers 2019  
Overview





## **C. Cabinet Member Job Description**

### **Global Teachers Fellowship Campaign**

#### **Cabinet Member Job Description**

Campaign Cabinet members will provide visibility, solicitations, and support for the campaign and will:

- Make a personal, meaningful gift to the campaign;
- Attend Cabinet kickoff meeting;
- Review confidential donor prospect lists and suggest additional prospects;
- Make solicitations to assigned campaign prospects including individuals, corporations and foundations;
- Meet twice a year for planning purposes
- Meet monthly (or as scheduled) via conference call

#### D. Cabinet Member Pledge Form

Yes! I wish to make a pledge of \$\_\_\_\_\_ to fund the Global Teachers Fellowship.

Donor Name(s)/Company Name: \_\_\_\_\_  
(As you would like it to be written in printed materials)

Please select how you want your contribution designated:

- To support the participation of a teacher from \_\_\_\_\_ County

(Please write in county/counties)

- Where it is needed most (counties in need or general operations for the Fellowship)

My pledge will be paid in \_\_\_\_\_ payments of \$ \_\_\_\_\_ beginning \_\_\_\_\_ (month) / (year) to be paid:

- Annually
- Semi-Annually
- Other: \_\_\_\_\_
- Please send payment reminders
- I/We wish to remain anonymous

#### Contact Information

Name \_\_\_\_\_

Company/Organization \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ Email \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Please make checks payable to **Go Global NC Council** and mail to: Go Global NC, PO Box 13628, RTP, NC 27709. If you would like to make a payment by phone with a credit card or via stock transfer, please contact Carla Ivey at [clivey@northcarolina.edu](mailto:clivey@northcarolina.edu) or 919-237-7952.

### E. Fundraising Progress Template

Donor ID	Donor Name	Additional Attributed Donor	Anonymous Gift?	Gift/Pledge Amount	Type (Full or Pledge)	County	Gift/ Pledge Date	Amount Paid	Pledge Balance

Payment Reminders	Number of payments	Frequency	Payment 1 Due Date	Payment 1 Amount Due	Payment 1 Reminder Sent	Payment 1 Amount Paid	Payment 1 Date Paid

F. Master Prospect List

Prospect	Organization	County	Connections	Solicitor/ Door Opener	Ask Amount	Status	Phone	Email	Notes



G. Case Statement

# BRINGING THE WORLD TO NORTH CAROLINA CLASSROOMS

The Global Teachers Fellowship Program





# GLOBAL TEACHERS ADVISORY COUNCIL

Honorary Co-Chairs: Governor Jim Hunt and Governor Jim Martin

**Millie Ravenel, Chair**

Executive Director Emeritus, Go Global NC  
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**Marla Adams**

Retired, Van Winkle Law Firm  
Asheville, N.C.

**Brenda Berg**

President and CEO, BEST NC  
Cary, N.C.

**John Dornan**

Educational Consultant  
Raleigh, N.C.

**Jim Fain**

Principal, Reid Street Consulting  
Raleigh, N.C.

**Ted Fiske**

Author, Former *New York Times* Writer  
Durham, N.C.

**Matt Friedrich**

Director of Development, NCSU  
Raleigh, N.C.

**Mo Green**

Executive Director, Z. Smith Reynolds Foundation  
Winston Salem, N.C.

**Dr. Bill Harrison**

Interim Superintendent Alamance-Burlington Schools  
Burlington, N.C.

**Meredith Henderson**

Senior Director of Programs, Go Global NC  
Research Triangle Park, N.C.

**Jo Ann Norris**

Retired, NC Public School Forum  
Raleigh, N.C.

**Nick Rau**

Director, Education and Training, Go Global NC

**Matt Scialdone**

Regional Teacher of the Year  
Raleigh, N.C.

**Cosette Serabjit-Singh**

Retired, Pharmaceutical Executive  
Raleigh, N.C.

# **North Carolina needs our leaders and workers to be globally competent and active participants in the global economy.**

To meet this need, teachers must be equipped to teach about the global economy and how it impacts everyone. They are already preparing this next generation of leaders – our current students.

Go Global NC, formerly the Center for International Understanding, was founded by the University of North Carolina in 1979. Our mission is to connect North Carolina to the world and the world to North Carolina. Since 1991, Go Global NC has sent more than 900 North Carolina teachers to study abroad in 16 countries. Teachers have gained new understanding of, and respect for, other peoples and cultures, and they have returned with the means and enthusiasm to share these perspectives in their classrooms. Given the growing importance of global awareness and competencies, the time has come to greatly expand this program.

Under the newly-organized Global Teachers Fellowship program (Fellowship), Go Global NC will raise \$10 million in order to assure that a teacher from every one of North Carolina's 100 counties will have the opportunity to study abroad every year. All Fellows will be fully funded. Currently 17 N.C. counties benefit from 10 donor scholarships that support 26 teachers a year to participate in this professional development opportunity. With this expansion, all 100 counties will benefit from an endowment and scholarships that will support an enlarged cohort of teachers.

School systems will nominate and select participating Fellows, who will take part in a four-phase program over 18 months that begins with a pre-departure seminar to help them get the most out of their global experience. During Phase II, they will embark on a 10-14 day study visit to one of four countries designated by Go Global NC each year. Under Phase III, returning Fellows create integrated global curriculum units for their classroom and develop presentations to faculty colleagues and the community. After one year, Fellows will meet for the final seminar to analyze and adjust the ways in which global content has been integrated into the curriculum. After Phase IV, teachers will be part of the larger Global Teachers network and receive ongoing global professional development opportunities.

The Global Teachers Fellowship program seeks to assure that global education will become an expected, respected and prominent part of the teaching progression in North Carolina. In doing so, it will further the formal goal of the State Board of Education that every North Carolina high school graduate will be fully prepared for the world.

# CONTENTS



## **The Need**

- Worldwide, National, State
- North Carolina's Global Connections
- Aligning Goals to Leverage a Global North Carolina
- Meeting the Need - Playing to Go Global NC's Strengths

## **How the Fellowship Works**

- Selection of Fellows and Countries
- Requirements and Deliverables
  - Phase I: Pre-Departure Seminar
  - Phase II: In-country Immersion
  - Phase III: Follow-up Planning for Classroom and Community
  - Phase IV: Re-assessment and Next Steps
  - Post-Fellowship: Continuing the Network

## **What is the Impact? Making a Difference in our Teachers, Students, and Communities**

- Global Teacher Areas of Impact
  - Creating Global Stewards
  - Expanding School Opportunities
  - Engaging Rural Communities
  - Retaining Teachers
  - Integrating STEM Subjects Beyond the Classroom
  - Comparing Educational Systems
  - Ongoing Professional Development
- Areas of Impact in Communities – The Ripple Effect
  - Students
  - Parents
  - School administrators, principals, and superintendents
  - Community members
  - Policy leaders
  - Business leaders

## **Global Teacher Fellowship Endowment**

- Cost Model by the Numbers
- Fundraising Model
- Staffing
- Fund Management

## **Conclusion**

### **Addendum:**

- Go Global NC Board of Advisors
- Sample Itinerary (Global Teachers - Germany 2017)
- List of Current Funders for Teachers on Go Global NC programs

# THE NEED

# The world is changing, fast. We have to be bold, move quickly, and ensure sustainability to meet evolving changes and challenges.

North Carolina is already global – yet we need many more people who understand how to take advantage of global opportunities. This Fellowship maximizes equitable student learning by providing teachers from every county a first-hand experience to learn from best practices across the world, address the guiding mission of the N.C. State Board of Education, and help their students find a place in the global economy.

The world is changing, fast. We have to be bold, move quickly, and ensure sustainability to meet evolving changes and challenges.

## Worldwide

In many other countries, there is no such thing as “global education.” Education IS global. The worldwide Organization for Economic Cooperation and Development (OECD) coordinates a global academic survey, the Program for International Student Assessment (PISA), which measures student achievement in various subjects. 500,000 students took the test in 2015, and it is the test by which most countries around the world measure their educational achievement. Recognition of the need for global competence has risen to such a priority that starting in 2018, students will be tested annually on the global competence metric.

## National

There are economic and global citizenship arguments for the need for global education. The economic argument views globalization as competition. Many businesses take advantage of a global supply chain that allows them to produce around the clock. This means that team members may be down the hall or

in another time zone. Using the economic argument for global education means our schools must prepare students to compete in a global economy.

While the economic argument is real and compelling, the global citizenship argument may be even more important. Many problems cannot be solved by one nation alone; they are global in scope and require global solutions. As Thomas Friedman proclaimed in his 2005 publication of *The World is Flat*, education must lay the foundation to be able to communicate and collaborate to solve pressing global problems.

In 1998, the Asia Society in New York and The Longview Foundation in Washington, D.C. launched a national effort to raise awareness of the need for global education, to help states develop policy support for this, and to create a national network of leaders in global education. North Carolina was an early national leader. Go Global NC led this two-year process of coalition building and in 2005 generated a policy report to increase global education in North Carolina schools.

## State

North Carolina is a nationally recognized leader in the K-12 global education field, translating global education to concrete policies that target teacher and student learning. In 2015, the N.C. State Board of Education’s (SBE) Task Force on Global Education released a policy report with a statewide infrastructure to recognize teachers, schools, and districts that meet global designations. To date, North Carolina is the only state in the nation with a comprehensive global education policy and criteria for teachers, schools, and districts.

These policies are the culmination of decades of progress in North Carolina. Policy leaders, education practitioners, academics in higher education, and business leaders alike have done their part to build this globally oriented mindset in North Carolina schools. But as research has shown, the single greatest determinant of a student's growth is his or her teacher, and the most effective professional development for teachers is experiential learning. International professional development has a unique power to elevate global education in North Carolina like no other program or policy can.

#### **North Carolina's Global Connections**

North Carolina is more diverse than ever. One out of every 13 North Carolinians is foreign born. We are just as likely to work, study, and partner with colleagues from Mexico, China, or Vietnam as we are from Hickory, Hatteras, or Greensboro. In 2015, foreign direct investment in North Carolina surpassed \$23 billion, contributing more than 242,000 jobs. North Carolina had \$30 billion in exports in 2015, \$2.31 billion dollars from our agricultural industry. Each year close to 11,000 students in higher education study abroad, and the number of students enrolled in advanced placement language courses continues to climb with a record high of 3,972 in 2013. North Carolina is connected to the world, and the world is connected to North Carolina. Learning to navigate a changing world is essential to our progress. It is imperative to pursue global opportunities with strategy and intent in order to succeed in a competitive global marketplace.

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#### **Aligning Goals to Leverage a Global North Carolina**

There are demonstrated worldwide, national, and state trends and policies in place that prove the need and benefits of educating teachers about the world. Go Global NC amplifies these results. The Fellowship directly supports SBE's commitment that every student graduates fully prepared for the world. In addition, Fellowship recipients are encouraged to earn the N.C. Department of Public Instruction's (DPI) Global Educator Digital Badge (Global Badge). Through their participation, Fellows will earn approximately 80 of the 100 required hours as well as meet the requirement for a capstone project to earn SBE certification.

### **Meeting the Need – Playing to Go Global NC's Strengths**

Since Go Global NC began the Global Teachers Program in 1991, over 900 teachers have traveled abroad to 16 different countries, including: China, Canada, Denmark, England, Germany, Ghana, India, Japan, Malaysia, Mexico, Netherlands, New Zealand, Singapore, South Africa, Spain, and Sweden. Go Global NC builds upon decades of expertise and leadership in the field of teacher immersion programs.

Only a small percentage of North Carolina's 95,000 full-time teachers have ever been abroad. Surprisingly, for some the program is their first trip on an airplane. For others, it is their first trip outside of North Carolina. 100% of these teachers receive financial awards to study abroad.

Far too commonly, teachers may think going abroad to be out of reach, distant, or unattainable. They are not likely to associate their profession with international opportunities. This prestigious Fellowship provides global opportunities and produces lasting impacts, far beyond the teachers. When a teacher from every county studies abroad every year, global education becomes more visible for every North Carolina teacher and their students, including in rural counties where global connections are often less apparent. The annual opportunity to participate in the Fellowship increases global engagement and makes the realities of the global economy and global citizenship more accessible and attainable. Over time, districts gain a critical mass of globally experienced teachers who have studied in many countries. The global teachers will have the skills, knowledge, competence, and confidence to help implement strategies toward meeting the global criteria which DPI has set for schools.



My greatest benefit was being able to witness first-hand education in the classrooms in Germany. We got to see their classrooms and how they interacted, moved, and learned. There was no way to skew these results. It wasn't being read in a book, and I was actually there. I can describe every second of that moment. I have taken so much back to integrate and learn from. My planning has broadened to include so many global issues, and now it doesn't just stop with Germany. It goes beyond Germany to many other countries, and I feel comfortable inviting guests in from other places to speak.

Joslyn Parker  
Cherokee County  
Germany 2014

# THE FELLOWSHIP

## How the Fellowship Works

The Fellowship provides North Carolina's outstanding teachers with the quickest and most economical way to increase their global competence through an 18-month-long leadership program. The Fellowship is designed for public and charter school teachers of all subjects, all grade levels, and at all stages in their careers. 100 teachers from 100 counties will be fully subsidized each year. In cases where multiple districts are in the same county, the fellowship will rotate among the districts.

### The Global Teacher Fellowship

- Awakens teachers' and students' excitement and engagement.
- Gives teachers and students an increased ability to view issues and problems from multiple perspectives.
- Encourages teachers who might not traditionally think about incorporating global concepts to expand their approach.
- Increases teacher retention and revitalizes passion for teaching.
- Provides teachers with a unique experiential learning opportunity to see different types of education, exposure to best practices, and new teaching methodologies.
- Guides teachers in design, development, and implementation of integrated global curriculum units for classrooms and presentations for school faculty and community.
- Provides support to N.C. Department of Public Instruction initiatives, such as the Global Badge.

## Selection of Fellows

School systems will select Fellows through their preferred method.

- *Option 1:* Design a countywide application, interview, and selection process. Go Global NC will provide resources, including various models and/or connections to other experienced counties upon request.
- *Option 2:* Align Fellow selection with the Teacher of the Year award. Schools and counties already have a well-developed Teacher of the Year selection process in place to assess the quality, motivation, and effectiveness of teachers. The Global Teachers Fellowship would be a significant reward to recognize the Teachers of the Year for their excellence.





## Selection of Countries

Countries are selected according to several criteria, including demographics, opportunities for economic growth and workforce development, existing Science, Technology, Engineering and Math (STEM) successes, leading educational practices, successful public policy planning, and diverse populations. The following are specific examples of how country selection is targeted to foster learning that aligns with North Carolina needs and realities.

- *Countries relevant to N.C.'s demographics:* Teachers learn successful strategies for increasing the engagement and learning of our students by understanding the cultures of our growing number of immigrant children.
- *Countries with examples of economic growth and workforce development:* Teachers visit N.C. companies' foreign offices and learn more about how the global economy affects their classrooms. They also visit foreign-owned companies invested in N.C. and learn about the workforce and educational needs for employees of these companies.
- *Countries with strong examples of STEM success:* Teachers visit schools training their students for a STEM career and companies employing those graduates.
- *Countries with leading educational practices:* The group visits teacher education programs in universities to compare and contrast education priorities and meets with national educational leaders about why their particular system works well for them.
- *Countries which align public policy planning with educational attainment:* Teachers see vibrant examples of how educational policies

and priorities align with workforce needs, such as urban planning transportation centers, housing developments that are ethnically diverse, schools training students for advanced manufacturing or renewable energy careers and the companies that hire them.

- *Countries with diverse populations, including racial, economic, and geographical composition:* Teachers meet with leaders successful in educating diverse newcomers to their country and culture; visit schools educating students with parents of diverse socioeconomic status, and rural and urban locations.

## Global Teachers Fellowship Requirements and Deliverables

Each Fellow must sign a contract and make a commitment to participate in four in-person sessions over an 18-month period. The Fellowship requires each teacher to design, develop, and implement at least one curriculum unit or other appropriate project and to present their experience with the school faculty and/or the larger community.

The Fellowship is divided into four phases:

**Pre-departure Seminar:** The 18-month fellowship kicks off with a two-day orientation. Prior to this first seminar together, Fellows are expected to read selected articles and books to prepare themselves for this international study experience. During the orientation, Fellows will be introduced to their host country's culture; learn from outstanding North Carolina academic and policy leaders; assess their pre-travel global competence; learn about working toward SBE's Global Badge;



and learn the “nuts and bolts” of their upcoming international study experience.

2. **Study Abroad:** The second phase of the Fellowship is a 10-14 day in-country immersion study abroad program. The Fellowship is a guided transformative experience where teachers make their own discoveries about global education and build new insights for what it means to prepare their students for the world. This experience is powerful and transformative and allows new knowledge to become deeply engrained, augments teachers’ skills, and models how to include global content in all teaching.

The Global Teacher Fellowship Includes:

- School visits in the host country, exploring linkages between the role of education and economic development.
- One-on-one conversations with host country teachers to share approaches to prepare students for jobs of the future.
- Meetings with global experts and leaders in various fields who challenge teachers to delve into global problems with implications for both N.C. and the world.
- Expansion of STEM approaches and application methods.
- Experience of different educational systems
- Access to extensive networks abroad and in N.C.
- Daily crosscultural immersion.
- Visits to important cultural, art, and historical sites and museums. A sample itinerary for the 2017 Germany

program is included in the addendum.

3. **Follow-up:** Two months after their return, Fellows participate in a follow-up professional development session in N.C. During the session, Fellows are led through a series of activities to debrief their experiences in their host country and to plan how they work together to develop new programs and units of study, plan their required school and community presentations; assess and compare post-travel global competence, and create a work plan for their Global Badge.
4. **Reassessment and Next Steps:** The final seminar occurs a year later, after Fellows have had a chance to implement changes in their schools and classrooms. Teachers reflect on the successes and challenges of the changes they envisioned; discuss ways to scale impact beyond their own classrooms, share progress toward receiving SBE’s Global Badge designation; assess their global contribution to their community; and identify next steps.
5. **Post-Fellowship-Continuing the Commitment:** Fellows are connected to an expanding network of Global Teachers throughout the state. They receive opportunities for ongoing professional development, information about new developments in the field, access to lesson plans and other resources, and news of statewide progress and global badge completions by their colleagues.

# THE IMPACT

**Making a difference  
in our teachers,  
students and  
communities**

The effects on the teachers are as numerous and diverse as the teachers who take part in these programs. Being a Go Global NC Fellow opens possibilities for teachers, students, and the greater school communities. Global experiences continue to impact the teachers, students, and schools years after participation. Teachers emerge with new global knowledge, state-wide professional networks, and fresh ideas for the classroom that continue to evolve.

In 2016, Go Global NC reached out to recent teacher alumni to gain additional insight of program impact. Nearly half of the recent alumni participated (129 alumni, 48%) in an online assessment. This outreach provided firsthand accounts and details on the depth and breadth of impact from participation in the program. The most prominent areas of impact are presented below.

1. **Creating Global Stewards:** *Shifting the minds of teachers and students*
2. **Expanding School Opportunities:** *Introducing or expanding globally focused programs*
3. **Engaging Rural Communities:** *Increasing global opportunities in rural areas*
4. **Retaining Teachers:** *Providing energy to reinvigorate teachers*
5. **Integrating STEM Subjects Beyond the Classroom:** *Making it come alive*
6. **Comparing Educational Systems:** *Learning from our international neighbors*
7. **Ongoing Professional Development** *Honing skills throughout a teacher's career*

## 1. **Creating Global Stewards**

*Shifting the minds of teachers and students*

Being able to offer firsthand perspectives gives teachers new levels of credibility with their students. When a teacher applies their personal experience with global challenges, different cultures, or the effects of history around the world, teaching is enlivened and carries a new relevance in the classroom. The enthusiasm that teachers project is infectious and often leads to students' deepening enthusiasm as well. Global Teachers reported that they had an enhanced ability to understand the perspectives of others (87%) and greater confidence in teaching and discussing global issues in the classroom (76%).

*My students were amazed by the pictures and stories from India. The unit I created to broaden their own perspectives began with their making predictions of the images, stories of the events, then they researched the actual location to uncover social bias and stereotypes as well as cultural facts and history. This started in their own home/neighborhood/community/region, went across the globe to India and came full circle to increase tolerance and understanding here at home.*

*Lorraine Orenchuk  
Digital Learning Facilitator  
Buncombe County  
India 2013*

## 2. Expanding School Opportunities

*Introducing or expanding globally focused programs*

Through experiential learning and global relationships formed during these programs, there are opportunities for teachers to develop globally focused programs, activities, and events for their school communities upon returning to North Carolina. Common examples include virtual or travel-based exchanges with a school abroad, new strategic language offerings, teacher exchanges, or the introduction of globally relevant courses and clubs.

*After returning from Germany, I organized a student tour to Germany, Austria, and Switzerland in April 2015. This spring I am taking a group of 32 people to Italy and will be traveling to Costa Rica in April of 2018.*

*Karen Kreitzburg  
Haywood County Schools  
Germany 2014*

## 3. Engaging Rural Communities

*Increasing global opportunities in rural areas*

Teachers and students in rural counties often do not have access to the opportunities that accrue to wealthier districts. It is a challenge to find support for outstanding teachers in North Carolina's most rural and frequently impoverished school districts. These districts rarely have education foundations, Chambers of Commerce, or large businesses that could support global opportunities for teachers.

teachers who study abroad in smaller districts have an out-sized impact on students, teachers, and the community: they will expose students to the wider world - something often taken for granted in metropolitan districts. In smaller districts, there is a higher opportunity for the transfer of skills and knowledge from teacher to teacher; and they have the potential to affect a countywide shift in priorities because of their knowledge and influence. Providing strong teachers from rural counties with the opportunity for global study is another tool for retaining those teachers who are often lured to nearby counties and states that can offer them more financial opportunities.

*I created a new course - International Studies. I have taken four groups of students to our partner school and hosted as they came here each year. It enhanced the cross-curriculum studies within our school as well as inspired other teachers and administrators to use partnerships.*

*Sonya Rinehart  
Edgecombe County  
Denmark 2009*

## 4. Retaining Teachers

*Providing energy to reinvigorate teachers*

Given a number of factors, North Carolina is losing many talented teachers annually, and applicants to the UNC systems' 13 Schools of Education have decreased, jeopardizing the teacher pipeline. By reigniting talented teachers' passion for teaching, the Fellowship

can create a powerful retention tool that provides the rejuvenation spark that increases the probability that the best and brightest of the state's teaching workforce remain in education in North Carolina. All previous participants (100%) surveyed agree that their participation in the Global Teachers program gave them new energy and ideas to bring back to their classroom.

## 5. Integrating STEM Subject Beyond the Classroom *Making it come alive*

All Go Global NC teachers programs include strong STEM content. All programs incorporate different applications of STEM principles and demonstrate how they may be integrated into North Carolina schools. If one is an English, Art, or PE teacher, STEM



I traveled with Go Global NC in my 15th year of teaching - the halfway point in my career - and it provided me with a reinvigorating spark for the second half of my career. I am now seeking my Global Educator's Digital Badge, and global education has become the guiding principal of the latter half of my teaching life.

While traveling in South Africa, I had the pleasure of collaborating with teachers with only two or three years of experience as well as some 20+ year veterans. Upon finishing an activity, our bus would erupt into the best professional development session any of us ever attended. Each experience was then expanded by our collaboration with each other - young and veteran teachers alike. Those young teachers came back having gained wisdom from the veterans, and the veterans couldn't help but to be energized by the younger teachers' passion and cutting-edge ideas. Retaining teachers is, of course, a priority in North Carolina, and the Global Teachers program can go one further; it can retain better, reinvigorated, globally-minded teachers who can then return to their schools and share their experiences with their colleagues and students.

Matt Scialdone  
Wake County Schools  
South Africa 2016

subjects are core to the experience. If one is a STEM teacher, they often expand STEM content throughout the school curriculum - beyond the STEM classroom.

*After traveling to Germany with Go Global NC and witnessing firsthand how both Germany and North Carolina have rapidly growing solar energy industries, I was charged to help students make meaningful connections between their lives and solar energy. We competed, and won the high school division, in a solar schools competition. Over the course of three months, all of my students mobilized not only each other, but also the entire school and their broader communities, to identify the environmental, economic, and human health benefits of solar energy in our community. We researched, took field trips, created projects, signed up supporters, created social media accounts (@AHSsolarCougars) on Instagram and Twitter, took #SolarPanelSelfies, created school lesson plans, and so much more. Throughout the competition, students were inspired by Germany and advancements in solar energy while also developing a sense of hope in our future. My experience in Germany was the seed for this entire experience.*

*Sarah Duffer  
Asheville City Schools  
Germany 2014*

seldom, if ever, have a chance to rejuvenate their approach to teaching. When teachers have a chance to watch each other, ask questions, and compare their own practices to those of other teachers, their ability to reach students broadens. Teachers who study abroad see radically different approaches to education - from specific modes of instruction to overarching educational policies. These strong departures from the ordinary lead to new insights about what we are already doing right in our classrooms and where we may have opportunities for significant growth. Almost all Global Teachers surveyed (95.4%) agree that their knowledge of global education allowed them to bring new dynamics to their teaching methods.

*The greatest benefit is for my students. When I challenge them to become globally minded, it is because I saw firsthand the far-reaching benefits of learning multiple languages, being environmentally conscious on a global scale, making applications locally, and getting the very best education available.*

*Carolina Bethea-Brown  
Haywood County  
South Africa 2016*

## 6. Comparing Educational Systems

*Learning from our international neighbors*

One of the biggest challenges in the teaching profession is isolation. Too many teachers are limited by the walls of the classroom and



## 7. Ongoing Professional Development

*Honing skills throughout a teacher's career*

The Global Teachers experience pushes teachers beyond their comfort zones by studying in an unfamiliar country and culture. Teachers internalize what they see, and their experience becomes a part of who they are; it gives them confidence and courage often not previously recognized. Through thoughtful program structure, the program provides a safe environment for teachers to stretch and explore new ideas and shine professionally. Many teachers call this program the best professional development experience of their careers.

*That program to India was one of the formative moments in my entire teaching career. Personally, it opened my heart and mind to a deeper understanding of people who are different than me, and yet, in so many ways, the same. Professionally, the trip built relationships that endure to this day. These relationships have led to continuing collaboration as well as deep and abiding relationships. In addition, I feel as though the experience in India softened my heart, and have made me a more compassionate teacher.*

*Bill Worley  
Johnston County  
India 2013*

## Impact in Communities - The Ripple Effect

In addition to the teachers themselves, the cumulative impact of a study abroad experience is felt by other stakeholders in North Carolina. Students are clearly the ones most impacted by the teacher's experience. They are our future leaders and workers who must be globally competent and active participants in the global economy. Global Teachers also impact parents, school administrators, community members, policy leaders, and business leaders. The benefits from the Global Teachers Fellowship will continue to grow and nurture a state of global citizenry across North Carolina.

### 1. Students

Students are excited about the raw energy a teacher brings to the classroom after their program experience. Students have an increased curiosity because their teacher tells stories and authenticates real-life experiences that open the world to them. A student from a far-western North Carolina county once remarked he was being taught by a teacher "who had seen the other side of the world." One teacher reports that "even my jaded high school kids get silent when I talk about other countries and other schools around the world."

*I was inspired by what I saw in South Africa, and I wanted to share that experience with my visual arts students. The result was the puppet show "One Home," created with the help of the Paperhand Puppet Intervention. I gave my students whole child leadership roles, and that was a challenge for my learners. They were given so much responsibility. The proceeds from the performance went to Chatham*

*United Way and LIV Village in South Africa.  
The day we told LIV that we had raised  
240,000 rand was a full circle for my students.  
That day the light bulb went off. They were  
so proud!*

*Leslie Burwell  
Chatham County Schools  
South Africa 2016*

who may advance to become administrators, principals, and superintendents. As education policy leaders, they then advocate for global education and encourage the infusion of global content in the classroom. The Fellow's supervisors, whether in the school, district, or state, recognize these strengths, appreciate this outstanding global professional development opportunity, and support the school's and district's globalization efforts.

*In a time when we are all more connected than ever, the importance of global understanding and interactions is now an integral element of the basic education for our students, communities, and our country. We talk about digital education, global education, and relevant educational experiences often as separate areas of work in education. It is my hope as a community, state, and country that those engaged in the preparation of our students understand that all of these are truly what we mean by EDUCATION itself. The educational experiences for students today are not confined to the school building, the university campus, or even the training facilities of businesses, but are connected to learning from others in multiple locations, languages, and disciplines.*

*Dr. Kathy Spencer  
Retired Superintendent of Onslow County  
Schools and Executive Director of Southeast  
Educational Alliance*

## 2. Parents

Parents see firsthand the impact of global learning on their children through increased interest in current events and interest in travel abroad. Because Karen Kreitzburg from Waynesville Middle School in Haywood County studied abroad on a James G.K. McClure Foundation Scholarship, she was motivated to take students abroad every year.

*Without this, my daughter and I would not have had the opportunity to see the places in the world she was learning about in the classroom. The trips are very fun and also very educational. Some things you just can't learn out of a book the same way as experiencing in person. Having teachers willing to take students on these trips is priceless. Thank you for providing a way to make it all possible.*

*Teresa Arrington and Samantha Carver  
Haywood County*

## 3. School administrators, principals and superintendents

Teachers who study abroad with Go Global NC are exemplary. They are part of a pipeline

## 4. Community members

Teacher alumni have an obligation to share their experience beyond the classroom.



They give presentations at PTAs, school board meetings, church meetings, civic clubs, or town halls. The community hears from “one of their own” and can become more appreciative of diversity and differences observed by their local teacher. Sharing the uniqueness, as well as the sameness, of other countries and cultures can help a community evolve towards more global understanding.

*I grew up in a small town, not near to where I was teaching at all, and we had a fellowship night at my home church and I was the guest speaker. I wore my Ghanaian outfit that my (Ghanaian) host teacher gave me. So, I wore that and I brought all my stuff and had a display and gave a presentation about the Ghanaian culture. She (my host) had even sent a Ghanaian shirt for my husband. He wore that and I brought back Ghanaian chocolate to give out to the kids...This is a white community, out in the country. So, it was cool that they were interested.*

*Marcella Cox  
Wake County  
Ghana 2005*

## 5. Policy leaders

When a foreign-owned company analyzes prospective locations for a new facility, it considers many factors. Our North Carolina Department of Commerce, Regional Economic Development centers, and local chambers of commerce constantly strive to recruit business for job creation. Sending teachers abroad consistently indicates a commitment to educate students ready

to compete in the global economy.

*As Secretary of the N.C. Department of Commerce, I found that when a foreign-owned company analyzes prospective locations for a new facility, it considers many factors. A primary, if not the number one consideration, in its decision is the availability of a skilled, well-trained workforce. They want to know if the state and locality are committed to and investing in the education and preparation of its students with the requisite skills and global perspective to drive that company's success. Competition among states is keen, and the existence of a Global Teachers Fellowship will give North Carolina a competitive edge that no other state has.*

*Jim Fain  
North Carolina Secretary of Commerce  
2001-2008*

## 6. Business leaders – urban and rural

North Carolina is home to many homegrown global businesses, foreign-owned companies that selected the state as their international headquarters, and multinational businesses. These global businesses seek a talented and globally astute workforce comfortable operating in the world economy. This Fellowship helps North Carolina graduate global students who can find prosperity in their own backyards.

*Today's society is a big global village more interconnected than any other time in history. With the exponential growth in connectivity of the Internet and social media networks, our students are more exposed to other cultures than ever before. Companies like AT&T today*

*are looking for talent that is multilingual and can collaborate in teams with members from other countries and cultures. When teachers come back home from the Global Teachers experience, they bring a unique asset that makes our state more competitive for businesses and grow good paying jobs here. I applaud Go Global NC for 26 years of taking teachers abroad and making*

*North Carolina a better state to live, work and prosper.*

*Carlos Sanchez  
Executive Director of External Affairs  
AT&T*

In rural counties, it is common that one of the largest employers is schools, and those school teachers are influential community leaders. Teachers that have a broad view of the world inspire their students to think critically and become lifelong learners. In order to excite and inspire our future generations, our teachers must have meaningful global experiences. These experiences prepare them to lead their classrooms with real life global examples that will in turn better prepare our rural students for jobs that involve a global economy. The North Carolina Farm Bureau has collaborated with Go Global NC for several years. Our leaders have been participants on their programs, so I know from firsthand experience that the programs they provide are powerful and relevant. We need global programs such as those offered through Go Global NC available for our teachers.

Larry Wooten  
President  
North Carolina Farm Bureau



# THE ENDOWMENT

### Global Teachers Fellowship Endowment

The Global Teachers Fellowship will ensure a teacher from each of North Carolina's 100 counties takes part in the Fellowship every year. In support of this goal, the Fellowship will establish a \$10 million endowment that will give annual, perpetual financial support to the program. Endowments signal longevity, strength of mission and purpose, and a commitment to stewardship and care. During the endowment campaign, our goal is to grow the endowment to ensure that teachers from across North Carolina, from every county, have equal access to participate in the Fellowship. Named gift opportunities exist at the county, regional, and statewide levels. A list of current donors and the counties served is in the addendum.

### Cost Model by the Numbers

This \$10 million endowment will serve as a powerful indicator of the importance of global

education for North Carolina. Of equal significance, though, are the financial efficiencies that the endowment would create. In contrast to annual funds which are raised and spent fully every year, endowment funds will be invested, with the annual income from interest serving as program income for the Fellowship. With the conservative estimate that a \$10 million endowment will generate 4.5% income from investments every year, income for the Fellowship would equal \$450,000 per year, or \$4,500 for each of the 100 teachers. Assuming overall costs of \$5,500 per teacher, the endowment would cover all but \$1,000 of a teacher's cost to take part, the final \$1,000 being a reasonable and surmountable amount for schools or districts to cover annually. Experience has shown that annual "buy-in" from a school or school district will help to reinforce the value of the Fellowship.

### By the Numbers

**\$5,500** = Program cost of a Global Teachers Fellowship per Teacher

**\$100,000** = Equivalent Endowment Level for a Single N.C. County  
(\$10 million total endowment/100)

**4.5%** = Anticipated Annual Interest Earned on Principal

**\$4,500** = Amount of Program Cost Offset by Endowment

**\$1,000** = Additional Amount Needed per Teacher as School District Buy-In

Annual Income  
from Interest

Annual School  
District Buy-In

Program Cost  
per Participant

$$\mathbf{\$4,500 + \$1,000 = \$5,500}$$

(4.5% x \$100,000)

## Fundraising Model

In order to raise the \$10 million required for the Global Teachers Fellowship Endowment, program leaders will enlist the support of multiple types of donors and supporters. Program leaders anticipate a ten-year campaign, from 2018 to 2028. Go Global NC will work with donors on a case by case basis and will offer different types of privileges and stewardship options for the different levels of funders.

When fully operational, the Global Teachers Fellowship anticipates having four annual cohorts of teachers. While all teachers' experiences will center on the core goal of improving global education in North Carolina and will therefore have common threads throughout all teachers' experiences,

there will be some variation in how this goal is approached. Teacher experiences will vary in terms of specific themes and countries studied. For instance, in a given year, Go Global NC may have four separate cohorts, with one cohort studying immigration and North Carolina /Latin American collaboration, a second studying Indian culture and history, a third studying approaches to STEM education in Western Europe, and a fourth studying international best practices in K-12 education in Singapore.

Beyond allowing for a deeper and more global experience for teachers, the four cohorts per year model will allow supporters to engage with the program in a variety of ways as well.

Go Global NC will offer to donors the following opportunities:

Donor	Amount	Rights	Total	Notes
Lead Donors (Statewide Donors)	4 Donors at \$1,000,000	Donors have the right to name a themed program for a period of 10 years	\$4,000,000	Offsets annual funds county-by-county for those counties who do not have a full endowment, or offsets staffing costs at Go Global NC once endowment funds cover 100 teachers.
Special Interest Donors	20 Donors at \$100,000 per donor	Donors are featured prominently in materials for a period of 5 years	\$2,000,000	Donors support a specific interest, such as a region of the state, a particular curricular area, or a programmatic theme.
County-level Donors	100 Donors at \$100,000 per donor	Donors have the right to name a Global Teachers Fellow within their county in perpetuity	\$10,000,000	Guarantees a spot in a Go Global NC program every year for a teacher in that county

Multiple fundraising strategies will be developed for this type of effort. The chart on the preceding page is one example. In order to reach the financial goal of \$10 million, Go Global NC will identify multiple donors at each of the levels listed. Any funds raised over the \$10 million goal will deepen the Fellowship experience or serve to expand the program to a greater number of teachers every year.

We also encourage planned giving. Planned gifts will be used to expand program offerings in the future, thereby allowing more teachers to become Global Teachers Fellows. Donors can indicate their intention to make a legacy gift in support of global education for teachers. A planned or deferred gift may be as simple as designating Go Global NC in a will or as a beneficiary of an IRA, which can be done with the assistance of Go Global NC. All planned gifts have tax benefits, and planning should occur with professional advice. Donors may make unrestricted gifts or direct their gift to a specific county. Gifts may be made in a donor's name or in honor of someone else.

### **Staffing**

Go Global NC will hire a temporary fundraising professional to launch and direct the campaign, develop campaign materials, guide the campaign's strategy, and serve as a front-line fundraiser for the campaign with individuals, corporations, and foundations.

As mentioned in previous sections, success in this campaign will require that Go Global NC increase the number of programs offered each year for teachers from one to four programs to accommodate the greater number of teachers taking part annually. We believe that a

public/private partnership model would be attractive to both private funders and to North Carolina's policymakers. Go Global NC proposes an agreement whereby there is public support that provides funds for additional full-time, program director-level staff as Go Global NC surpasses various endowment milestones.

### **Fund Management**

The endowment will be managed by one of North Carolina's community foundations set up for this purpose or with Paragon Bank. Ultimate oversight and decisions about fund management rest with the Go Global NC Council, the 501-C-3 entity created over 25 years ago with board members from around the state.

**This engaged students in diverse thinking as well as introduced them to diverse cultures. This was needed in our rural setting, and our community has embraced the program as well. I have had students since this endeavor study abroad and have two that are now working abroad. It opened my eyes to the real possibilities of a small rural district having a partner school to open our students to the world.**

**Sonya Rinehart  
Edgecombe County  
Denmark 2009**





# THE CONCLUSION



Over the years, this Fellowship will reap exponential dividends for our teachers, schools, counties, and the state. A network of globally competent teachers working in rural and urban, large and small districts will promote global opportunities, content, and awareness for our students and their futures. Go Global NC's talented teacher alumni are already respected and valued members of their communities. Their global competence and leadership elevates the importance of North Carolina's place in the global economy. Global Teachers emerge with a wider – and wiser – vision of the world and what is needed for their students to be successful.

We know North Carolina is a nationally recognized leader in global education. The North Carolina State Board of Education created the only comprehensive global education policy in the nation. This is our chance to support this policy with action. Let's continue our cutting-edge leadership as the only state in the nation with a Global Teachers Fellowship. Let's make a commitment and go for it. Let's give every county in North Carolina a cadre of globally competent teachers to educate students who are ready to live, work, and contribute in an interconnected world.

# ADDENDUM



**Go Global NC Council  
Board of Advisors  
2016-2017**

Anita Brown-Graham  
Professor of Public Law and Government,  
UNC School of Government  
Chapel Hill, N.C.

Peter Brunstetter  
Chief Legal Officer,  
Novant Health  
Winston-Salem, N.C.

Chris Mulder Charbonneau  
VP Communications and Marketing,  
Knowledge Works Foundation  
Cary, N.C.

Jean Davis  
President and CEO,  
Microelectronics Center of NC (MCNC)  
Research Triangle Park, N.C.

Jim Fain, Vice Chair  
Principal,  
Reid Street Consulting  
Raleigh, N.C.

Ted Fiske  
Author, Former *New York Times* Writer  
Durham, N.C.

Alan Gordon  
Managing Attorney,  
Alan Gordon Immigration Law  
Charlotte, N.C.

Moise Khayrallah, Chair  
CEO,  
Aerial BioPharma, LLC  
Morrisville, N.C.

Wayne McDevitt  
N.C. State Board of Education  
Marshall, N.C.

Nicole Murphey  
Bridgehouse Law  
Charlotte, N.C.

Robert Orr  
NC Supreme Court Justice (retired)  
Raleigh, N.C.

Jennifer G. Parser  
Poyner Spruill, LLP  
Raleigh, N.C.

Jose A. Perez  
Director, Global Markets,  
iConsulting  
Chapel Hill, N.C.

Millie Ravenel  
Executive Director Emeritus  
Go Global NC  
Raleigh, N.C.

Cosette J. Serabjit-Singh  
Pharmaceutical Research Scientist (retired)  
Raleigh, N.C.

Joe B. Whitehead, Jr.  
Professor, Physics Department  
NC A&T University  
Greensboro, N.C.

**Global Teachers to Germany**  
**Professional Development Program June 2017 Itinerary**

**Friday, June 16:** In-Transit to Berlin

**Saturday, June 17:** Berlin

Morning: Arrive Berlin. Transfer by bus to hotel with a guided orientation tour of Berlin on the way

Afternoon: free-time to explore Berlin, recover from jet lag

Group Dinner and orientation program

**Sunday, June 18:** Berlin

Morning: Independent Field Study; Challenge by Choice Activities

Afternoon: Cultural and historic tour of Berlin including visit to the Reichstag, home to German Parliament and developed as a green building

**Monday, June 19:** Berlin

Morning: School visits

Afternoon: Visit to a Refugee/Immigration Center and Program

**Tuesday, June 20:** Stuttgart

Early Morning: Transfer to Stuttgart

Morning: Introduction to and discussion of the German school system and education model.

Afternoon: Site visit to Mercedes Benz Museum

Group Dinner

**Wednesday, June 21:** Stuttgart/Freiburg

Morning: Site visit to Eschbach Gymnasium and Realschule.

Afternoon: Depart Stuttgart for Freiburg. Debrief on the bus

Late Afternoon: Guided tour through Vauban, Freiburg's famous energy-efficient neighborhood

**Thursday, June 22:** Freiburg/St. Peter

Morning: Presentations on Freiburg's Concept of Sustainability; Teacher Education; Introduction to the University of Education

Afternoon: Site visit of St. Peter, a small energy-efficient village in the black forest region. The village produces its own energy via solar, wind and water energy as well as other renewable technologies

**Friday, June 23:** Munich

Early Morning: Transfer to Munich

Afternoon: Site visit of BMW Training Facility; Presentations on the Teacher in the Economy Program

Group Dinner

**Saturday, June 24:** Munich

Morning: Site visit to Dachau Concentration Camp

Afternoon: Site visit to Deutsches Museum, a museum of science and technology

**Sunday, June 25:** Munich

Morning/Afternoon: Independent Field Study; Challenge by Choice Activities

Evening: Group dinner and final debrief

**Monday, June 26:** In-Transit to North Carolina

## Current Status of Global Teachers Funding

In 2016, 28 teachers from 19 counties were fully funded to study in Germany. Seventeen North Carolina counties already prosper from consistent funding for teachers to study abroad. Donors tell us that this is one of their most important annual grants.

*We realized that for the citizens of North Carolina to succeed in this new reality that demands global literacy, our young people had to have teachers who were not just proficient in traditional academic subject matter, but were deeply globally literate. Go Global NC provides the tools for our teachers to develop that deep global literacy, and we are proud to support them in that effort. Our foundation believes the impact has been so significant, that we have continued to fund two teachers from Buncombe County for over 20 years.* Joel Adams, The Beattie Foundation.

*Our teachers are under so much duress nowadays. This is a way we can give them encouragement that their work is valued and important.* John Ager, The James G.K. McClure Fund, regularly funds five counties in western North Carolina.

Following are the foundations which supported teacher awards for the Global Teachers to Germany program:

Alamance Area Chamber of Commerce - \$6500 – Alamance County Schools

Anonymous Trust –\$6,500 - Sampson County Schools

The Beattie Foundation - \$12,000 – Two teachers from Asheville City and Buncombe County Schools

The Borchardt Fund of the Triangle Community Foundation - \$70,000 – 10 teachers from Chapel Hill-Carrboro City Schools, Chatham County Schools, Durham Public Schools, Orange County Schools, and Wake County Schools

Burroughs Wellcome Fund - \$13,000 - supported the Regional Teachers of the Year from the Northeast and Piedmont-Triad Regions in 2017 because they were STEM teachers

Mariam and Robert Hayes Charitable Trust - \$26,000 – Four teachers from Kannapolis City Schools, Cabarrus County Schools, and Stanly County Schools

Carolyn Hunt Global Teacher Endowment – \$6,500 - State Teacher of the Year

James G.K. McClure Fund for Education and Development of the Western N.C. Community Foundation- \$32,500 – Five teachers from Cherokee, Haywood, McDowell, Rutherford, and Yancey County School Systems

Blanche and Julian Robertson Family Foundation - \$6,000 – Rowan-Salisbury Schools

Dan Royster Memorial Teacher Award – \$2,500 - Wake County Schools



# THE IMPACT

- 🍏 Creating global stewards
- 🍏 Expanding school opportunities
- 🍏 Engaging rural communities
- 🍏 Retaining teachers
- 🍏 Integrating STEM subjects beyond the classroom
- 🍏 Comparing educational systems
- 🍏 Ongoing professional development

## HOW CAN YOU HELP?

You can help the Global Teachers Advisory Council by joining funders across the state to build a \$10 million endowment that will ensure 100 North Carolina teachers bring world experiences to North Carolina students every year in perpetuity! Go Global NC will work with donors on a case-by-case basis, and our suggested donation model can be found here:  
[gtfellowship.info](http://gtfellowship.info)

H. Fellowship Tri-fold



## CONTACT

GO GLOBAL NC  
68 T.W. ALEXANDER DR.  
RESEARCH TRIANGLE PARK, NC 27709  
919-314-2826 | [GOGLOBALNC.ORG](http://GOGLOBALNC.ORG)

## GLOBAL TEACHER FELLOWSHIP

CONNECTING NORTH CAROLINA  
AND THE WORLD



# WHO WE ARE

Go Global NC has connected North Carolina and the world for nearly 40 years. Through global leadership programs and training, we empower North Carolina with the skills, understanding, connections, and knowledge to succeed in a global community. We have worked with everyone from teachers and law enforcement to policy leaders to increase our state's economic success.

# OUR GOAL

Global Teachers creates globally competent teachers with the skills and knowledge to educate students ready to live, work, and contribute in an interconnected world. Our goal is to raise \$10 million to create an endowment to send 100 teachers - one from each North Carolina county - on a Global Teacher Fellowship each year **in perpetuity.**

# THE PROCESS

Global Teacher Fellows are nominated by their school systems. Go Global NC will select the destination countries and assign teachers to their program. Chosen teachers will begin their learning experience through study in a pre-departure workshop. They will travel on a 10-14 day intensive educational program abroad, followed by guided collaboration and implementation sessions that occur two months and one year post-travel. Their access to contacts they make during the Fellowship and the statewide Global Teachers network, as well as continuing global professional development opportunities, will last a lifetime.

"The greatest benefit is for my students. When I challenge them to become globally minded, it is because I saw firsthand the far-reaching benefits of learning multiple languages, being environmentally conscious on a global scale, making applications locally, and getting the very best education available."

CAROLINA BETHEA-BROWN

HAYWOOD COUNTY | SOUTH AFRICA 2016

"My students were amazed by pictures and stories from India. I created a unit to broaden their own perspectives and by asking them to make assumptions of the images, and stories of the events. Then they researched the actual location to uncover social bias and stereotypes as well as cultural facts and history. This project started in their own home and community, went across the globe to India and came full circle to increase their tolerance and understanding here at home."

LORRAINE KASYAN

BUNCOMBE COUNTY | INDIA 2013

# OUR GLOBAL TEACHERS

Since the first Global Teachers program was created in 1995, more than 900 teachers from across North Carolina have been part of professional development programs in 16 countries. Teachers from all grade levels and all subject areas emerge with new global knowledge, statewide professional networks, and fresh ideas for the classroom that continue to evolve and ignite students' enthusiasm for the global community.





# GLOBAL TEACHER FELLOWSHIP

BRINGING THE WORLD TO NORTH CAROLINA CLASSROOMS

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