

**Muscogee (Creek) Nation Higher Education Scholarship Foundation  
Program Evaluation, September 26th and 29th, 2014**

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**Program Evaluation**

**Muscogee (Creek) Nation Higher Education Scholarship Foundation**

**Okmulgee, OK**

**Tax ID 73-0932018**

**Evaluation Date: August 29, 2014**

**Evaluator: Nicky Kay Michael, PhD**

**Table of Contents:**

- 1. Executive Summary and Recommendations**
- 2. Program Description**
- 3. Evaluation Methodology**
- 4. Findings and Reflections**

# Muscogee (Creek) Nation Higher Education Scholarship Foundation Program Evaluation, September 26th and 29th, 2014

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## Executive Summary:

Dr. Wayne Johnson and Sandra Peters, donor and scholarship developer, both spoke to the mission of the Higher Education Scholarship Foundation Program (Foundation) stating that the organization was not waiting for someone else to empower their Creek people and instead that the people themselves can support their own students. They both firmly affirmed that Foundation is an exercise in sovereignty, strength, self-determination, and proactive community participation.

## Findings:

My findings in this evaluation validate the above assertions that the Foundation is a thoughtful and creative exercise in tribal sovereignty, which empowers Creek people. The following lends credit to this notion:

### Tribal Government Commitment:

- Tribal law via federal regulation enabled the Creek Nation members to develop the Foundation via the Internal Revenue Service (IRS) designation as a 7871.
- Tribal gaming revenues enable the administration operating funds, while all of the donations are strictly allocated to scholarship recipients.

### Local community support and effectiveness of fundraising:

- Self-supports through employee giving program.
- Tribal members can and have developed their own scholarships (often in name and memory of a loved one) to solicit funds for their scholarship.
- The administration places much effort to educate and provide information to the Creek Nation members first and the public second. This serves to assure a solid base of support among the Creek Nation members as well as serves a best practice in fundraising principles.

### Effectiveness in supporting Higher Education students:

- Not only do the higher education student scholarship recipients receive financial support, but also obtain emotional and mentorship via the scholarship developers.
- Students are grateful, writing letters of gratitude and attending functions which recognize them.

### Internal Capacity and Professionalism

# Muscogee (Creek) Nation Higher Education Scholarship Foundation Program Evaluation, September 26th and 29th, 2014

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- All Public Relations and social media information is attractive, designed to articulate the mission, and professional in appearance.
- Even though the organization is young, the Foundation has the capacity of an organization in existence of seven to ten years.
- The Foundation's organizational documents are well defined and prescribe a Vision, Mission, and Core Values. Additionally, an accepted timeline proclaiming the original ownership of Muscogee (Creek) history illustrates how the Foundation is relevant to Muscogee philosophy, society, and history. The Core Values are articulated in the Muscogee language.
- The Director is strategic, creative, and purposeful with the "Development" of the Foundation.
- The Foundation is housed under the Education program and is part of an agency culture that aspires for team players and advocacy efforts from all stakeholders.
- The Foundation's Board and Administration contains highly educated and well-positioned members in society as well as within the Muscogee culture.
- In the evaluation, all of the participants felt that there is great transparency and ease of access to information, Administration, and events.
- The accounting is well documented and the Accountant, Mr. James Pratt, has a strong record of accounting procedures and best practices.

## Recommendations:

1. While the staff developed the internal mechanisms of tracking and donor solicitation via excel software, the next steps call for increased capacity to track and link donors, hard and soft gifts, and track pledges and donations. The contrivance of best practices in fund-raising recommends software programs such as "Razors Edge," to enable this capacity.
2. There is a much greater need than is being met through the Foundation to support Higher Education students. A succinct questionnaire and survey to tribal members could serve to obtain the hard data regarding exactly how many students are in higher education. In turn, this data will assist in justifying grant and fundraising efforts.
3. As the Foundation grows, the need for relationship development and efforts necessitate more broad distribution among the Executive Committee and other key stakeholders. All should share in the fundraising efforts of the Foundation.
4. As outreach increases to Private Foundations and Corporations, each member of the Board will need to demonstrate a strong record of "giving" financially to the Foundation.

# Muscogee (Creek) Nation Higher Education Scholarship Foundation Program Evaluation, September 26th and 29th, 2014

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5. Because the organization is a 7871, a tribal foundation, the administration will need to increase their efforts to educate the public, particularly in relation to potential donors.
6. The Fundraising Goals are targeted and creative. Yet, there needs to be an actively engaged committee to assure the goals are met and they should revise the plan if necessary. Moreover, there needs to be an annual fundraising campaign. Campaigns can be short or long term strategies for gaining large sums of capital. Individual giving remains the highest form of "giving" in fundraising.

## Program Description

The Foundation is an extension of Muscogee values, history, and legacy of education and reciprocity. Additionally, the Foundation functions as a channel to exercise self-determination, self-sufficiency, and Nationhood. Mr. Pratt expressed that an educated membership leads to a stronger Nation as a whole. When the Nation invests in the education of its members, this will reflect in the ability of the Creek Nation to exercise its sovereignty and for individuals to give back to the Nation. As the members become more educated and marketable with a diversity of skills and abilities, so will the members rely less on any types of assistance or dependence for their livelihood.

With the aforementioned motivations in mind, the Muscogee (Creek) Nation passed the National Council Ordinance NCA 12-239 on December 15, 2012. Section 7871 of the IRS Code states "in certain specific areas, section 7871 of the Internal Revenue Service Code (IRC) places tribal government on the same footing as State and local governments that provide similar services to their citizens." Furthermore," tribal governments can be the recipient of income tax deductible charitable gifts, as well as the recipients of funds deductible from estate and gift taxes." <http://www.irs.gov/Government-Entities/Indian-Tribal-Governments/FAQs-for-Indian-Tribal-Governments-regarding-IRC-Section-7871-%28Tribes-Treated-Like-States-for-Federal-Tax-Purposes%29>

The Foundation qualifies the Muscogee (Creek) Nation to raise money on behalf of scholarship, community education, and research to benefit its citizens. Essentially, the Foundation is equivalent to a 501(c)3 non-profit charitable organization.

## Foundation mission:

The central purpose and role of the Muscogee (Creek) Nation Higher Education Scholarship Foundation Program established by the Muscogee (Creek) Nation National Council is to promote self-sufficiency, proactive community participation, self-reliance, self-determination, exercise the proficiency of tribal sovereignty and provide a sustainable future for Muscogee (Creek) Nation citizens through academic scholarships, community educational initiatives and research that benefit the growth and prosperity of Muscogee (Creek) Nation communities. The

# Muscogee (Creek) Nation Higher Education Scholarship Foundation Program Evaluation, September 26th and 29th, 2014

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Muscogee (Creek) Nation Higher Education Scholarship Foundation Program is a Muscogee (Creek) Nation tribal government non-profit program qualified under Section 7871 (a) of the Internal Revenue Service Code. All contributions to the Muscogee (Creek) Nation Higher Education Scholarship Foundation Program are tax deductible.

## Foundation Activities:

Each step in growth of the Foundation has been strategic, purposeful, and meticulous. From the inception of the Foundation to hiring the Director and then establishing the base of support through tribal members and employees, the Foundation has established the necessary groundwork to launch more aggressive and comprehensive fundraising activities. Corporate and Philanthropic Organizations often grant monies to non-profits with a successful financial record that has been operating three years or longer. The Foundation is on track to reach out and assert its standing.

The activities listed in Goals 8.0 will enable the Foundation to maintain and broaden its fundraising efforts. Concurrently, these efforts will demonstrate to granting agencies that the Foundation is stable and can create revenue streams. These activities will attract additional funding.

## Evaluation Criteria:

This evaluation was conducted in accordance to best practices in non-profit development and good tribal governance standards. Notwithstanding the fact that the Foundation is one of very few in throughout the United States utilizing a 7871 status through tribal code, there remains room for growth and improvement from the longstanding fundraising and development practices in federal 501(c)3 non-profit charitable statuses. With these best practices in mind the Evaluator examined criteria of non-profit development, good tribal governance, as well as effectiveness in reaching the needs of the higher education population of the Muscogee (Creek) Nation.

Criteria include but are not limited to:

- Effectiveness in supporting Higher Education students
- Internal Capacity, Experience and Education level of Administration and Staff
- Commitment level of Tribal Government, Board, Committees, and Donors
- Fundraising capacity and effectiveness founded in normal range of non-profit competency
- Creativity in fundraising activities
- Communication between administration, donors, and students

# Muscogee (Creek) Nation Higher Education Scholarship Foundation Program Evaluation, September 26th and 29th, 2014

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- Support of local community to the Foundation efforts
- Support of Muscogee (Creek) Nation toward the mission of the Foundation
- Ability to meet the goals and objectives outlined in strategic plans
- Foundation culture reflects tribal traditional values

The results of the 2013 Evaluation met most of the Goals and Objectives with the exception of the following two:

Objective 7.2;

Goal 9.0

*Plan and develop direct mail campaign for potential donors.*

The Evaluation result was "Progressing." This Objective has been fully met in 2014.

Goal 10.1

Objective 10.1

*By the end of June 2013, the Muscogee Nation Higher Education Scholarship Foundation Program will have sent information of documented needs to 500 potential donors of individuals, corporations, and foundations according to documentation.*

The Evaluation result was "Progressing." This objective has been fully met in 2014.

Goals and Objectives for the years 2014-2015

*1.0 Continue to develop, maintain and evaluate a Higher Education Scholarship Foundation Program.*

*1.1 By then end of September 2015, the Muscogee (Creek) Nation will have continued to develop, maintain, and evaluate a Higher Education Scholarship Foundation Program that supports academic scholarships, community initiatives, and research that benefit the Muscogee (Creek) Nation communities according to documented results.*

Progressing as evidenced by:

# Muscogee (Creek) Nation Higher Education Scholarship Foundation Program Evaluation, September 26th and 29th, 2014

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- The Annual Report celebrates a successful year of awarding scholarships, recognizing Donors and Supporters, tracking Revenues, and identifying Executive Committee members and staff.
- The Employee Donor program has participants in eighteen departments and nine casinos.
- Staff includes a Resource Development Specialist, Administrative Assistant and Director.
- Thirteen scholarships exist for the application and were awarded in 2014

*2.0 Identify potential sources of funding by researching public and private foundations, agencies and grant opportunities.*

*2.1 By the end of September 2015 the Higher Education Scholarship Foundation Program will have identified 250 potential funding resources that will fiscally support Muscogee (Creek) citizens through academic scholarships, community initiatives, and research that benefits the Muscogee (Creek) Nation communities according to a data base.*

*2.1.1 Identify 250 potential funding sources and store on a data base by the end of September 2015.*

Progressing as evidenced by:

Two lists have been generated to identify potential resources of fiscal support: 1. "18 and Over list," with 55, 892 Muscogee (Creek) Nation members and 2. TERO Vendors with 127 Businesses.

*3.0 Organize and conduct a strategic planning session to review and update the 2015 fiscal year strategic planning document for fiscal year 2016.*

*3.1 By the end of March 2015, the Higher Education Scholarship Foundation Program will have conducted a strategic planning session to update the strategic plan that will guide the Foundation Program during the 2016 fiscal year according to an updated strategic planning document.*

*3.1.1 Plan, coordinate, and conduct a strategic planning session by the end of March 2015.*

Progressing

*4.0 Sustain a data base of restricted and non-restricted donors.*

*4.1 By the end of September 2015, the Higher Education Scholarship Foundation Program will have solicited 100 restricted and/or non-restricted donors to support Muscogee (Creek) students through academic scholarships, community initiatives, and research that benefit the Muscogee Nation communities according to a list of donors.*

# Muscogee (Creek) Nation Higher Education Scholarship Foundation Program Evaluation, September 26th and 29th, 2014

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4.1.1 *Identify and solicit prospective restricted and non-restricted donors by the end of September 2015.*

Progressing as evidenced by an existing excel spreadsheet.

5.0 *Ensure donors receive tax-exempt receipts.*

5.1 *By the end of December 2014, the Higher Education Scholarship Foundation Program will have provided tax-exempt receipts to 100% of the donors that provided donations for fiscal year 2014 and 2015 according to documented results.*

5.1.1 *Provide tax-exempt receipts to 100% of the donors that donated to the Higher Education Scholarship Foundation Program by the end of December 2014 for fiscal years 2014 and 2015.*

Fully met as evidenced by copies of tax-exempt letters to donors.

6.0 *Update and maintain a Higher Education Scholarship Foundation Program website.*

6.1 *By the end of December 2014, the Higher Education Scholarship Foundation Program will have updated its website with current Foundation Program information and standards according to documented results.*

6.1.1 *Updated the Higher Education Scholarship Foundation Program website by the end of December 2014.*

Fully met as evidenced by the existence of an updated website attached to the Muscogee (Creek) Nation website.

7.0 *Update program brochure and marketing material to enhance the Higher Education Scholarship Foundation Program personality and fundraising activities.*

7.1 *By the end of December 2014, the Higher Education Scholarship Foundation Program will have updated its program brochure for distribution to the general public according to documented results.*

7.1.1 *Distribute a Higher Education Scholarship Foundation Program brochure to the general public by the end of September 2015.*

7.2 *By the end of December 2014, the Higher Education Scholarship Foundation Program will have updated its marketing material for distribution to the general public to complement the Higher Education Scholarship Foundation Program in its fundraising efforts according to documented results.*



# Muscogee (Creek) Nation Higher Education Scholarship Foundation Program Evaluation, September 26th and 29th, 2014

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7.2.1 *Distribute marketing material to the general public by the end of September 2015.*

Progressing as evidenced by the updated copy of the brochure.

8.0 *Plan and coordinate fundraising activities.*

8.1 *By the end of September 2014 and 2015, the Higher Education Scholarship Foundation Program will have planned fundraising activities for fiscal year 2015 and 2016 according to a calendar of activities.*

8.1.1 *Plan fundraising activities for fiscal year 2015 and 2015.*

8.2 *By the end of September 2015, the Higher Education Scholarship Foundation Program will have planned, continued, conducted and offered its Direct Mail Campaign to 4,000 Muscogee (Creek) Citizens and other prospective donors according to documented results.*

8.2.1 *Plan, coordinate, and conduct a Direct Mail Campaign by the end of September 2015.*

8.3 *By the end of September 2015, the Higher Education Scholarship Foundation Program will have planned, continued, conducted, and offered its Workplace Giving Program to the employees of the Muscogee (Creek) Nation according to documented results.*

8.3.1 *Plan, coordinate, and conduct a Workplace giving program by the end of September 2015.*

8.4 *By the end of September 2015, the Higher Education Scholarship Foundation Program will have planned, continued, conducted, and offered its Annual Benefit Golf Tournament to prospective donors.*

8.4.1 *Plan, coordinate, and conduct a Benefit Golf Tournament by the end of September 2015.*

8.5 *By the end of September 2015, the Higher Education Scholarship Foundation Program will have partnered with the Tourism and Recreation Department and participated in the "Mvskoke Hall of Fame Induction Gala" fundraiser to benefit Higher Education Scholarship Foundation Program.*

8.5.1 *Partner and participate in the Mvskoke Hall of Fame Induction Gala fundraiser by the end of October 2014 and 2015.*

8.6 *By the end of December 2014, the Higher Education Scholarship Foundation Program will have updated its Christmas Celebration to a "Christmas Celebration and Silent Auction" fundraiser to benefit the endowment of the Foundation Program.*

8.6.1 *Plan and update the Foundation Program's to a "Christmas Celebration and Silent Auction" fundraiser by the end of December 2014.*

8.7 *By the end of September 2015, the Higher Education Scholarship Foundation Program will have planned and conducted "Scholarship Foundation Telethon 2015" fundraiser to benefit the endowment of the Foundation Program.*

8.7.1 *Initiate, plan, and conduct "Scholarship Foundation Telethon 2015" by the end of September 2015.*

# Muscogee (Creek) Nation Higher Education Scholarship Foundation Program Evaluation, September 26th and 29th, 2014

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*8.8 By the end of September 2015, the Higher Education Scholarship Foundation Program will have initiated and planned a Major Gifts Program to help build the Foundation Program through scholarships, community initiatives, and research.*

*8.8.1 Initiate and plan a Major Gifts Program by the end of September 2015.*

Progressing as evidenced by Hall of Fame announcement, program agenda, Workplace Giving announcement flyers, Workplace Giving Goals and Objectives, eighteen participating departments and nine casinos participate in the Workplace Giving, Golf Tournament flyer, Christmas Dinner Celebration Agenda, relationship building with the 66ers, Enbridge Energy, and others.

*9.0 Provide program information and special needs of the Higher Education Scholarship Foundation Program to prospective donors to encourage individuals, corporations, and foundations to establish trusts, contribute to the endowment, or provide donations of gifts.*

*9.1 By the end of September 2015, the Higher Education Scholarship Foundation Program will have sent information of documented needs to 500 potential donors of individuals, corporations, and foundations according to documentation.*

*9.1.1 Develop and send information of documented needs to prospective donors of individuals, corporations, and foundations by the end of September 2015.*

Progressing as evidenced by Direct Mailing Campaign Goals, solicitation letters, and donation form.

*10.0 Sponsor and coordinate meetings with Higher Education Scholarship Foundation Program committees and volunteers and the Annual Celebration & Recognition of Higher Education Scholarship Foundation Program Donors.*

*10.1 By the end of September 2015, the Higher Education Scholarship Foundation Program will have met with 100% of its committees and volunteers according to documented results.*

*10.2 By the end of September 2015, the Higher Education Scholarship Foundation will have conducted an Annual Celebration & Recognition of Foundation Donors by the end of September 2015.*

Progressing as evidenced by newsletter, THE MVSKOKE SCHOLAR, which recognizes donors.

*11.0 Refine the process for scholarship requests and awarding of scholarships.*

# Muscogee (Creek) Nation Higher Education Scholarship Foundation Program Evaluation, September 26th and 29th, 2014

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11.1 *By the end of September 2014 and 2015, the Higher Education Scholarship Foundation Program will have reviewed and refined a plan to process Higher Education Scholarship Foundation Program requests and the awarding of scholarships according to documentation.*

11.1.1 *Refine and implement a plan to process Foundation Program requests and the awarding of scholarships by the end of December 2014.*

Progressing as evidenced by meeting minutes, February 28, 2014 discussing streamlining processes.

12.0 *Monitor the effectiveness of the Higher Education Scholarship Foundation Program.*

12.1 *By the end of September 2015, the Higher Education Scholarship Foundation Program will have conducted an external evaluation of its program goals, objectives and budget according to an assessment.*

12.2 *By the end of September 2015, the Higher Education Scholarship Foundation Program will have conducted weekly meetings; and produced semi-annual and annual reports to the Division of Education and training and Executive Branch to monitor program effectiveness according to documented results.*

Progressing as evidenced by this external evaluation.

13.0 *Submit administrative reports in a timely manner to the Executive Committee and Members of the Higher Education Scholarship Foundation Program.*

13.1 *By the end of September 2015, the Higher Education Scholarship Foundation Program will have submitted all administrative reports in a timely manner to the Executive Committee according to documented results.*

Progressing as evidenced by reports to the administrative reports.

