

## **ELIZABETH BOWERS ZAMBIA EDUCATION FUND 2007 ANNUAL REPORT**

The Elizabeth Bowers Zambia Education Fund (EBZEF) is an Oregon 501c3 public charity operating under the laws of the State of Oregon. EBZEF was established by the family of Elizabeth Bowers, a Peace Corps Volunteer who died in 2002 while serving in the village of Lumwana West in NW Zambia, Africa.

The purpose of EBZEF is to provide the opportunity for education for young women from the village of Lumwana West and the surrounding area. This includes 8<sup>th</sup> and 9<sup>th</sup> grades in Lumwana West Basic School, 10<sup>th</sup> through 12<sup>th</sup> grades in Mwinilunga High School and Mukenge Girls' School (both boarding schools), as well as education beyond high school. It also includes support for educational supplies and facilities.

### **ADMINISTRATION**

#### **Tax Exempt Status**

A major accomplishment in 2007 was Internal Revenue Service approval on March 16 of EBZEF's application for 501c3 tax exemption as a non-profit organization. EBZEF was established as an Oregon corporation on March 8, 2006. All donations are retroactively tax exempt to the incorporation date.

#### **EBZEF Partners**

World Vision Zambia (WVZ) administers education funds locally for a 10 percent fee. Our WVZ agent is Esther Nkumbwa in the Mwinilunga Area Development Program, which is supported by World Vision Australia. Funds to construct the library in Lumwana West were donated by EBZEF to the Peace Corps Partnership Program (PCPP) in 2006. Peace Corps Volunteer (PCV) Jessica Hillsley oversees the continuing construction of the almost complete facility.

#### **Board of Directors**

Members of the Board of Directors and the Advisory Board are listed in Attachment A. The Board of Directors provides direction and oversight for the EBZEF program. EBZEF thanks Catherine Jarmin, who resigned in 2007, for her contribution. New Board members welcomed in 2007 include Karen Chittick, Secretary, and Jennifer Roney, Treasurer. Angela Wanak, EBZEF's 2006 PACE intern, is now a member of the Advisory Board.

Meetings and major topics for the Board of Directors in 2007 were March 29 (fundraising), July 26 (education), and November 15 (finances). In 2007, EBZEF established a committee structure through which to conduct business. International Board members Fordson Kafweku and Dan Irvine are members at large and advisors to each committee, as their expertise is needed.

**The Executive Committee** makes decisions and acts on behalf of EBZEF in emergencies and between Board meetings. Members include Linda Bowers/Chair, Gerry Bowers, and Michal Wert.

Under the leadership of Jennifer Roney, the Executive Committee has scheduled a strategic planning retreat for January 2008 for the EBZEF Board, Advisory Board and key volunteers.

**The Finance Committee** keeps full and accurate accounts of EBZEF financial records, oversees disbursement of funds, and makes regular financial reports to the Board of Directors. Members include Michal Wert/outgoing Chair; Jennifer Roney/Treasurer and incoming Chair; Bookkeeper Susan Beck, and Linda Bowers.

EBZEF submitted its first tax report as an Oregon Corporation in 2007 with Kathy Gordon, CPA for Aldrich, Kilbride & Tatone. Bank of the Cascades continues as the depository for corporation funds under the guidance of Assistant Vice President Stewart Williams. Jenny Hector at Carter & Carter worked with EBZEF to process its first stock donation through Raymond James Financial Services Inc.

The Board of Directors approved a streamlined process for payment of 2008 fees for Beth's Girls. Tuition will be paid on a per girl per term basis in December in anticipation of term 1 costs, and in April/May to reconcile costs and to pay for the remainder of the school year. Receipts have not been forthcoming from World Vision Zambia though EBZEF continues to stress that receipts are required.

A projected five-year budget for expenses and needed revenue was prepared to guide fund-raising for 2008 and to guide discussions on program sustainability.

**The Education Committee** monitors scholarship recipients in Lumwana West Basic School and Mwinilunga and Mukenge High Schools. It administers a competitive selection process, develops criteria for college programs, and provides regular reports to the Finance Committee and the Board of Directors. Members include Angela Wanak/Chair, Linda Bowers and Amber Buchanan.

In 2007 a formal application process and selection criteria were developed for Beth's Girls requesting EBZEF support for higher education.

The teacher-to-student ratio in Lumwana West is 1:150. There are five trained and one untrained teachers with a serious lack of teacher housing. Lumwana West is now part of the new Lunga Area Development Program (ADP), sponsored by South Korea. Practical implementation is a year away, but it may help to extend Lumwana West Basic School into a high school to provide secondary education in Lumwana West, thus saving the cost and stress of boarding school.

**The Fund-Raising Committee** oversees publicity, events, grants and scholarships for EBZEF. It will work with the Finance Committee to develop a strategy for sustainability, with Beth's Girls administering the scholarship program at a future date. Members include Jeani Bragg/Chair, Linda Bowers, and all EBZEF Board and Advisory Board members.

Fund-raising activities were held throughout 2007 including publications, events, and preparation of informational materials.

#### Publications/Media

- *Statesman Journal* front-page article in October
- *Willamette University Home Page* featured Linda, Gerry and EBZEF
- *Willamette Collegian* full-page article on Zambia Night
- *KBZY Radio* advertised Zambia Night
- *Peace Corps* internal network
- One of top 10 stories referred to the Willamette University Board

#### Memberships/Subscriptions

- EBZEF joined the Nonprofit Association of Oregon
- EBZEF subscribed to the Chronicle of Philanthropy

#### Events/Presentations

- Participated in Willamette University Africa Day on February 22
- Participated in Salem World Beat Festival on June 24-25
- Linda and Gerry gave a presentation to the Kiwanis on August 7
- Sponsored Annual Zambia Night EBZEF Fund Raiser on October 3; Mary Lundeba spoke at Willamette University as well as at Zambia Night
- Linda and Gerry met with Return Peace Corps Volunteers in Portland on October 14
- Linda gave a presentation to a TIUA class who agreed to take on a fundraising project for EBZEF on October 15
- Peace Corps awarded Linda and Gerry a plaque of recognition and appreciation for their five-year effort to educate Beth's Girls on October 16

#### Informational Materials

- EBZEF calendars were prepared to pull together Zambia information, to provide a challenging project for student volunteers, and to provide a thank-you to major donors and partners.
- Newsletters, published in May and December and circulated by mail and email, continue to be a major fund-raising and information sharing resource for EBZEF supporters.
- The website was updated to include new and changing information ([www.bethsgirls.org](http://www.bethsgirls.org))
- Expanded slide presentations on the Bowers' visit to Zambia, highlighting Beth's Girls and featuring information about Zambia, were prepared for Zambia Night and are available for other fund-raising activities.
- EBZEF hired photo editor Evan Stuart to create an EBZEF video for YouTube and to educate EBZEF on ways to use the internet for fundraising. He added a FaceBook profile, which has 91 members to date. Our new gmail address is [ebzefund@gmail.com](mailto:ebzefund@gmail.com)

#### Notable Donations

- Caritas Charitable Fund made a \$10,000 donation to EBZEF
- Patty and Richard Lofgren donated our first gift of stock in the amount of \$2,000
- Salem Rotary awarded EBZEF a \$2,000 grant to buy books for the memorial library
- Rotary Interact, South Salem High School, contributed \$437.30 to EBZEF and are interested in writing to Beth's Girls.

#### Fund-raising Advisors

- Denise Crawford, Director of Development at the Atkinson Graduate School of Management, Willamette University, met with the EBZEF board to discuss fundraising strategies.
- Leonard Kelly, a professional fundraiser, is a volunteer resource available to define and review strategies, review grant applications, and to advise generally on fund-raising.
- Liz Reilly, Consultant for The Collins Group, is available for professional review of grant applications.

#### Professional Educational Opportunities

- Linda Bowers attended Technical Assistance for Community Services (TACS) monthly networking meetings.
- Linda, Karen and Cassandra attended a two-day TACS fund-raising seminar in September.
- Jeani, Karen and Linda participated in an NAO-Grant Station Insider program.
- Grant prospects and strategies were identified for 2008.

An on-line donation program was refined and operational in 2007. Efforts to increase donations through this avenue will be explored in 2008.

**The Library Committee** is responsible for oversight of library construction, shipment of books, hiring a librarian, and general facility maintenance. Members are Karen Chittick/Chair, Jeani Bragg and Linda Bowers.

PCV Jessica Hillsley followed PCV Bob Wilder as our “eyes and ears” on the library construction project in Lumwana West. Construction inspections required part of the library to be rebuilt, but it is near completion. EBZEF will contract with Books for Africa to send a container of books to Lumwana West and Mwinilunga. Changes in the U.S. Postal Service policies make it prohibitively expensive to ship books and EBZEF is working with Books for Africa and World Vision to share costs.

**The Technology Committee** was formed to investigate opportunities for how technology can improve life of Lumwana West families. Specifically, it is looking at the potential for solar power for the library and computers for students. Members are Michal Wert/Chair, Acacia McGuire, and Delaney Roney.

Acacia, a continuing student intern just back from a semester in South Africa, prepared a white paper from her research on the MIT laptop computer program.

It has been challenging, but EBZEF is trying to deliver a functioning computer for use by Mr. Njolomba, Lumwana West Basic School headmaster, so that more direct discussion can occur between the community and EBZEF. He received a used computer from Peace Corps that did not include software. If Mr. Njolomba gains internet access in 2008, it will greatly improve communications.

#### **Financial Status**

EBZEF accounts are managed with QuickBooks for Non-Profits. Approximately 75 percent of expenses for 2007 were for program services. This included education and supplies for Beth’s Girls, construction and books for the Lumwana West Library. About 12

percent was spent on administration and 13 percent for fundraising. Fundraising costs were low because of the many volunteers who supported fundraising activities. A statement of financial activities for 2007 is available upon request.

### **BETH'S GIRLS**

There was a large influx of girls into Grade 8 in 2007. This required additional fund-raising efforts to accommodate all girls wishing an education in the community.

Table 1 shows the breakdown of girls supported by EBZEF since the program began in 2003. Educational scholarships for 2007 included school fees, books and supplies, uniforms, tutorial and exam fees, plus room and board for high school students at Mwinilunga and Mukenge High Schools.

Table 1. Beth's Girls by Grade

	2003	2004	2005	2006	2007
Grade 8	12	14	14	26	40
Grade 9	21	10	11	21	25
Grade 10	7	4	6	5	7
Grade 11	6	7	7	6	6
Grade 12	0	6	7	6	7
SubTotal	46	41	45	64	85
College			1	2	2
<b>Total</b>	<b>46</b>	<b>41</b>	<b>46</b>	<b>66</b>	<b>87</b>

Beth's Girls sign an agreement to be diligent in their studies, to live a healthy lifestyle and to mentor other younger girls. They and their parents sign contracts that they will support EBZEF goals and ideals. The girls receive information on Beth and her values and correspond with the Fund to report their progress and discuss their goals for the future.

EBZEF continues to support Mary Lundeba, Beth's fisheries trainer in Kitwe. Mary is in her second year of PhD work at Penn State University. EBZEF funded a tutor for her statistics courses. Through EBZEF contacts, Mary applied for and was awarded an \$8,000 PEO International Peace Scholarship. She attended the Zambia Night celebration in Salem and met her Oregon sponsors for the first time. Mary successfully completed her qualifying exams for the PhD on November 29.

EBZEF supported Prudence Masanyinga, the first of Beth's Girls to graduate from high school, at the Local Government Training Institute in Lusaka. She had an internship for World Vision at Lumwana West and prepared a research paper entitled "Participation of Girl Child in Education." Prudence will qualify for her certificate in December.

## **LOOKING FORWARD TO 2008**

### **Education**

EBZEF is committed to supporting any girl in the Lumwana West area wishing to continue her education, as funding allows. Continued efforts to improve communication with WVZ and the schools will facilitate better provision of services.

With tutoring and increased support, more of Beth's Girls will be graduating from high school. To the extent possible, EBZEF wants to support further education for these girls. It is the goal of EBZEF to become self-sufficient in ten years, with Beth's Girls managing as many aspects of the program as possible.

### **Library**

The Lumwana West Library should become operational in 2008. The first shipment of books should arrive in 2008, and efforts to contract with a librarian will begin. We hope to identify one of Beth's Girls with an interest in returning to the community to manage the library and to fund her studies to become a librarian.

It is also a priority to install a solar-powered panel on the library to provide lighting and computer connections.

### **Fundraising**

Two newsletters a year continue to be the major fund-raising venue. EBZEF will explore an expanded Zambia Night fund-raising effort to recognize and encourage donors, and will investigate participating in the Day of the African Child in Portland in June 2008. Other events include Africa Week at Willamette University in February and World Beat Festival in late June.

Cassandra will work as a paid EBZEF intern in 2008 to develop a fund-raising strategy, prepare fund-raising materials, and create a record-keeping system.

Board members Jennifer Roney, Jeani Bragg, and Linda Bowers will attend a three-day course, Grant 101, from the Grant Institute to be held at Portland State University on January 22-24. Each will receive a certificate in Grant Writing upon completion.

### **Administration**

The committee structure established in 2007 will become fully operational in 2008. The January strategic planning session will provide a blueprint for EBZEF to reach its goal of self-sufficiency and sustainability by and for Beth's Girls in the future.

To access the EBZEF and its partners:

Elizabeth Bowers Zambia Education Fund - [www.bethsgirls.org](http://www.bethsgirls.org)

World Vision International - [www.wvi.org](http://www.wvi.org)

Peace Corps - [www.peacecorps.gov](http://www.peacecorps.gov)

Attachment:

A - EBZEF Board of Directors and Advisory Board Members

**Attachment A**  
**ELIZABETH BOWERS ZAMBIA EDUCATION FUND**  
**2007 BOARD OF DIRECTORS**

Linda O. Bowers, President  
Assoc. Prof. of English  
Willamette University  
Salem, OR

Jeani M. B. Bragg  
Faculty & Intercultural Specialist  
Tokyo Int'l University of America  
Salem, OR

Gerard F. Bowers, PhD  
Prof. of English  
Willamette University  
Salem, OR

Daniel E. Irvine  
Tech & Program Specialist  
Global Unit  
World Vision International  
Washington, DC

Karen Chittick, Secretary  
Assoc. Dir., Academic Services  
Tokyo Int'l University of America  
Salem, OR

Fordson Kafweku  
Reg. Operations Manager  
World Vision International  
Choma, Zambia

Jennifer L. Roney, Treasurer  
Frame Consulting, Principal  
AGSM Professor  
Willamette University  
Portland, OR

**ADVISORY BOARD MEMBERS**

William F. Bragg  
Ass't. Dir., Willamette Academy  
Willamette University  
Salem, OR

Angela Wanak  
Law/MBA student and former PACE intern  
Willamette University  
Salem, OR

Michal A. Wert, Principal  
MW Consulting  
Newberg, OR