

# Alex Patafio Foundation Kickoff

Fri 15 Aug 2025 • 4h 8min

## Board Introductions and Expectations

- Meeting began with reminders to use clear voices for audio recording and a relaxed, conversational atmosphere (drink/snack options, planned private chef dinner).
- Chris outlined a fluid agenda including introductions, organization overview, bylaws review, board elections/ratifications, financial/budget discussion, and prioritization of strategy pillars.
- Introductions included a roundtable of board members answering:
  - One person (dead or alive) they'd want on the board
  - Best advice ever received
  - What makes you unique
  - A special hidden talent
- Responses emphasized mentorship, the power of relationships, courage, resilience, instincts, the impact of family and community, and a variety of unique talents (instinct, opera singing, trip planning, people-reading, art, seeing others' skills).

## Foundation Vision, Mission, and Board Culture

- Chris outlined foundation goals: honoring Alex by turning tragedy into meaningful benefit for the community.
- Emphasis on celebrating achievements, focusing on a few core objectives, and learning from both successes and failures.
- Board expectations include accountability, open discussion, diversity of thought, risk management, governance, psychological safety, and inclusive

decision-making.

- Board service is flexible in time commitment, emphasizing guidance and support over extensive hours.
- Legal and fiduciary responsibilities reviewed; importance of good judgment highlighted.
- Encouraged board to consider personal fit and satisfaction with board participation.

## Foundation Website Walkthrough and Communication Tools

- Chris demonstrated the foundation website:
  - Main operations hub for communication, metrics, success updates, and mission outreach.
  - Slogan: "See something, do something" guides proactive community engagement around alcohol misuse.
  - Board and strategy sections highlighted; board member bios, vision, mission, beliefs, success metrics, and volunteer/donation forms reviewed.
  - Plans to highlight Alex's story, blog, event/gallery photo integration, and partnership showcases (e.g., restaurants/bars with program window stickers and QR codes).
  - Website design and improvement handled by ZEK Marketing and board members; ongoing process for trademarking the logo.

## Legal and Administrative Aspects

- Michael Cross (legal counsel) reviewed:
  - No legal requirement for Directors & Officers or General Liability

insurance, but both are prudent for nonprofit boards. Board agreed to seek insurance quotes.

- Explained indemnification provision in bylaws, IRS requirements for income distribution and public charity status, and mechanisms for accepting out-of-state donations.
- Trademarking process for the foundation's logo and advice on using independent insurance brokerages.
- Timelines and retroactivity of IRS 501(c)3 determination (foundation in process, expect approval soon).
- Annual board member registration/renewal with state charity offices discussed.
- Board unanimously ratified:
  - Officer roles (Chris as CEO, Zach as Treasurer, etc.)
  - Law firm as legal counsel; Wilson Lewis as accountants (with nonprofit specialist); Hoffman Financial as financial advisor
- Overview of wrongful death settlement funding (\$1M seeded for foundation), with ongoing consultation on how best to allocate/disburse funds for maximum tax and operational benefit.
- Board discussed credit card/website processing fees, exploring alternatives (Venmo, Zelle, etc.), and tasking treasurer/secretary with optimizing donation flow.
- Simplicity in donations preferred—remove overly complex program earmarks from donation page.
  - Goal to ensure 100% of donations go to programming, not overhead.
- Recommendation to use a more memorable/short marketing domain if possible ("foralexssake.com" suggested).
- Agreed on info@ or hello@ styled email handles for communications, with possible Gmail/Gsuite backend for manageability.

## Strategic Priorities & Program Ideation

- Board reviewed and workshopped vision, mission, and beliefs, emphasizing simple, memorable language focused on saving lives through cultural change (not just legislative reform).
- Want to broaden mission beyond just DUI, to alcohol misuse and responsibility more generally.
- Five strategic pillars:
  - Legislative Change/Advocacy: Working with GSU Law and Professor Derek Pope's legislative drafting course to draft and advocate for evidence-based, impactful legislation at city/state/federal levels; considering focus on increased penalties, vehicle safeguards, and judicial process improvement, but being cautious about nonprofit limits on political activity.
  - Industry Engagement: Building coalitions with restaurants, alcohol service, ride-share, automotive/tech companies; piloting interventions like restaurant partnerships for safe rides, staff training, and employer alcohol policies.
  - Educational Development: Creating awareness/prevention curriculum for youth, seminars/infomercials, leveraging Alex's story, and championing the endowed law school scholarship at GSU.
  - Partnerships: Pursue collaborations with law enforcement, community orgs (like MADD/AA), corporate partners (e.g., Uber, Lyft, sports teams, rotary club), and sports venues (for event-related alcohol policy change). Plans to create recognition programs for officers/restaurants prioritizing safe rides over arrests.
  - Fundraising: Structure for donation tracking, simplifying process for donors, and leveraging board, community, and corporate networks for growth.
- Specific tactical ideas included working with local police on safety awards rather than ticket-writing incentives, using tech for vehicle breathalyzers, leveraging local school internship/service hours for foundation support, and

optimizing social media/blog/newsletter outreach with board/intern involvement.

- Board plans to develop brochures/decals and reaching out to local business, sports, and entertainment figures as foundation grows.

## **Suggested Action Items**

- Board to seek insurance quotes for both D&O and general liability coverage.
- Treasurer and secretary to research and optimize online donation platforms (explore non-credit card options).
- Chris and Michelle to follow up with accountant on tax-optimal strategies for fund disbursement/seed capital.
- Board to wordsmith vision/mission for simplicity and memorability, and clarify messaging around cultural vs. legislative change.
- Initiate contact with GSU Law/Professor Pope for legislative partnership.
- Begin planning approach for restaurant/bar partnerships (brochures, window decals, training curriculum).
- Set up foundation social media accounts; assign regular updates/posts (possibly to an intern).
- Collect and compile recurring expenses for budgeting; circulate proposed budget for board input.
- Research best practices and alternatives for fundraising/donations (Zelle, Venmo, Cash App integration).
- Publicly announce foundation launch (website/socials); clarify board member communication protocol.
- Develop and implement content plan for quarterly newsletter and website blog with board/intern contributions.
- Follow up and report to board on legal, accounting, and financial advisor updates, as well as 501(c)3 determination.

