



*Albany Public Schools Foundation*

# STRATEGIC PLAN



Adopted on April 15, 2020

## Executive Summary

The Albany Public Schools Foundation Board of Directors held a board retreat on January 31, 2020 to update the strategic plan and address the following topics:

1. Update mission and vision statements
2. Create an impact and organizational goals for the next five years
3. Create initiatives and deliverables to support the above goals and mission

The current Board of Directors has a passion and deep interest in the mission of the Albany Public Schools Foundation, which is to generate and distribute resources to educational programs and provide scholarships for students of the Greater Albany Public School District.

This plan utilized self-assessments, staff program comments, and the previous strategic plan to develop the goals, strategies, and next steps that will guide the board and committee recruitment efforts, staff focus, and board priorities for the coming five years.



## **Mission, Vision, Guiding Principles**

**Mission Statement:** The mission of the foundation is to generate and distribute resources that enrich and enhance education opportunities for all students, encourage teachers to implement innovative education programs, and award scholarships to Greater Albany Public School District students.

**Vision Statement:** Every Student. Every Opportunity to Succeed.

**Guiding Principles:** The Albany Public Schools Foundation's belief in education is:

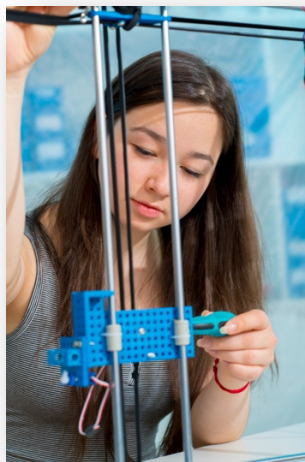
**Aligned** with the mission, vision and strategic plan that supports the Greater Albany Public School District's interests. The Foundation's ethics must be reflected in our work for the future.

**Transparent and knowledgeable** in respect to donor gifts and business sponsorships, so we wisely manage and honor the intent of all gifts.

**Respectful** of all of the diversity in our Greater Albany Public School District including ethnicity, creed, financial status or disability of students and staff.

**Informed** by the expertise of Foundation staff and board members, while celebrating our passion and desire to welcome all views and differences to build collaborative solutions to learning opportunities.

**Collaborative** when it counts; with government, with other organizations, with local business, and with other foundations who share our belief in the future of youth.



## **Board Members and Participating Staff**

### **Board**

Joanne Alford - President  
 Suzanne Bodlovic – Vice President  
 Erik Fedler – Past President  
 Bob Stalick – Co-Secretary  
 Monica Banks-Figueroa – Co-Secretary  
 Stephanie Black – Co-Treasurer  
 Elaine Wells – Co-Treasurer  
 John Andersen  
 Kimberly Christensen  
 Tracy Day  
 John Donovan  
 Cindy Draper

Melissa Goff – Ex-Officio/Superintendent  
 Stephanie Hagerty  
 Lynn Hubert  
 Lindsay Jansen-Hostetler  
 Lindell Johnson  
 Fred Koontz  
 Chris Nelson  
 Eric Nelson  
 Dave Pautsch  
 Jeff Precourt  
 Lisa Shogren  
 Ilynn Winn

### **Staff**

Aimee Addison – Executive Director  
 Sarah LaFond – Bookkeeper/Admin Assistant

Claire Muscutt – Development Director

*\* Meeting facilitated by Aimee Addison and Joanne Alford*

## **About Albany Public Schools Foundation**

The Albany Schools Foundation was incorporated as a 501(c)(3) in 1984 by a small group of local citizens who wanted to raise special funds for educational needs in the Greater Albany Public School District. Today, the Foundation has a full time Executive Director and Development Director and a part-time bookkeeper/administrative assistant who supports the work and fundraising efforts of a board of Directors made up a diverse group of educators, professional business leaders, and community members.

With over 2.2 million dollars in assets, the Foundation’s goal is to leverage its fundraising efforts in the community to support teacher and student-driven initiatives that move the mission of the Foundation forward. The Foundation manages its assets, organizes and promotes fundraising events, and seeks to grow community collaborations, in order to fund innovative programs and initiatives in the Greater Albany Public School District.

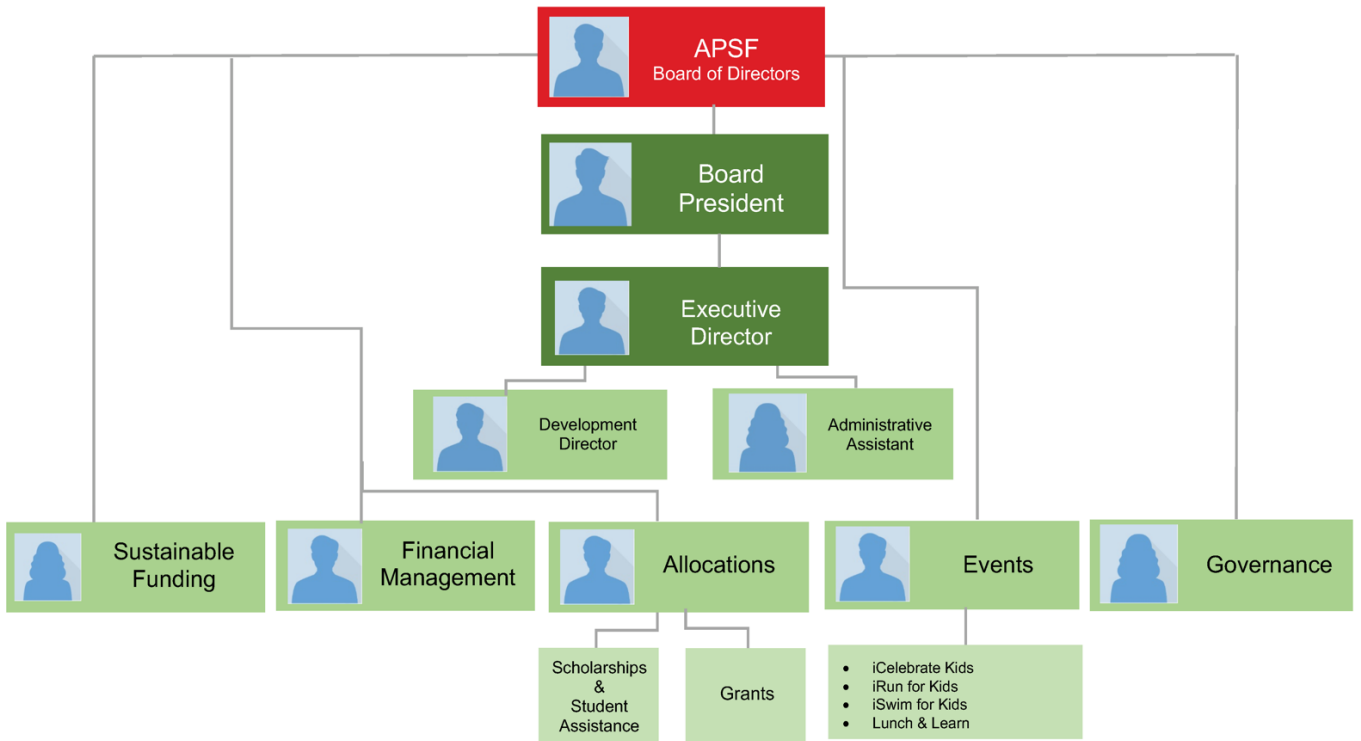
The Foundation’s hallmark events in the community are iRun for Kids (a 5k, 10k, 15k walk/run), iSwim for Kids (school district wide swim-a-thon), and iCelebrate Kids Benefit Gala (dinner and silent auction). Together these fundraisers pack in over 1500 participants and 100’s of community volunteers. These events form the back-bone of the special programs that the Albany Public Schools Foundation supports on an annual basis – Classroom grants and Elementary Enrichment Grants. The Foundation also utilizes special donor funds for the scholarship and student assistance program for qualified youth, encouraging them to move into higher education opportunities at college/universities and trade schools.



**Board and Committee Structure**



**ORGANIZATION CHART**



## Goals and Strategies 2019-2020

<b>Goals</b>	<b>Functional Area</b>	<b>Deliverables</b>
<b>Overall Goal</b>	<b>Impact</b>	<b>Increase impact 2 times in 5 years</b> Impact total in 2018-19 = \$258,571
Create a highly engaged, aligned and thriving APSF Team; from Board to Committee to Employee	Culture	<ul style="list-style-type: none"> <li>• Create a diverse organization so that we are representative of our students, teachers, and community</li> <li>• Create a culture that appreciates staff and volunteers</li> </ul>
	People	<ul style="list-style-type: none"> <li>• Create a written job performance review process</li> <li>• Invest in continual learning for staff &amp; board/committee</li> <li>• Review and edit job descriptions for all key positions</li> </ul>
	Process	<ul style="list-style-type: none"> <li>• SOP's for events, programs and financial tasks</li> </ul>
Create a lasting impact that changes lives from the classroom to post-secondary opportunities for GAPS students	Product (Our Impact)	<ul style="list-style-type: none"> <li>• Work with GAPS leadership to determine priority needs in early Spring</li> <li>• Create a plan to leverage external partnerships to catalyze growth and impact</li> <li>• Package our “product” through creative marketing strategies</li> <li>• Maintain an ongoing positive working partnership with GAPS Administration</li> </ul>
Ensure sustainable and exponential gross revenue growth of APSF through enhanced donor giving & grants	Pipeline and Revenue	<ul style="list-style-type: none"> <li>• Grow major gift program through 20 asks of \$5000+ per year</li> <li>• 6 meaningful meetings per month with individual donors</li> <li>• Conduct 60 meaningful prospect in-person or virtual/phone visits annually &amp; associated stewardship (includes corp. sponsors &amp; corp. scholarships)</li> <li>• Grow our planned giving programs by holding 1 Lunch &amp; Learn event annually</li> <li>• Develop a new sponsorship request booklet by the end of June which includes event sponsorship, scholarship opportunities, and the Student Assistance Program</li> <li>• Secure eight new matching scholarships of \$2500+</li> <li>• Secure \$20k in matching Student Assistance Program donations</li> <li>• Hold video interviews of grant or scholarship recipients (acquire quotes/pics/other) for our “case for support”</li> <li>• Increase grant writing applications &amp; capacity. Submit and minimum of 8-10 grant requests</li> <li>• Secure new endowment agreements</li> </ul>



## Initiatives & Action Items

## INITIATIVE:

Create a highly engaged, aligned and thriving APSF team;  
from Board to Committee to Employee

### Action Items

Culture	People	Process
<ul style="list-style-type: none"> <li>• Recruit 2-4 new board members that bring new diversity to the board (demographics/social circle/skills)</li> <li>• Recruit two committee members that bring a diverse background, culture or perspective</li> <li>• Schedule a board training on diversity, equity &amp; inclusion</li> <li>• Plan for inclusion of DEI topic in three board meetings</li> <li>• Create an ad hoc committee which will develop an annual plan to show appreciation to staff and volunteers</li> <li>• Showcase "job well done" person/group at board meetings</li> </ul>	<ul style="list-style-type: none"> <li>• Use new review process in June 2019/20 reviews</li> <li>• DD: Work towards CFRM (pending funding availability)</li> <li>• Aimee: Finish National School Foundation Leadership training classes</li> <li>• Staff/board: Attend CNS Annual Conference</li> <li>• MVDP Membership (attend sessions)</li> <li>• Complete Board training on diversity, equity &amp; inclusion</li> <li>• Update the Board job description</li> <li>• Update Committee job descriptions</li> <li>• Update Staff job descriptions</li> </ul>	<ul style="list-style-type: none"> <li>• Write procedures for all events: iSwim for Kids, iRun for Kids, iCelebrate Kids, and Lunch &amp; Learn</li> <li>• Write procedures for all programs: Classroom Grants, Elementary Enrichment Grants, Donor Designated Grants, Student Assistance Program, Special Circumstance Grants, Big Impact Grants, and Scholarships</li> <li>• Complete SOP for setting up an Endowment</li> <li>• Write procedures for financial processes</li> </ul>

## INITIATIVE:

Create a lasting impact that changes lives from the classroom to college (or trade school) for GAPS students

### Action Items

#### Product (Our Impact)

- Create a marketing calendar
- Videos: Event/other
- Event marketing
- Radio Ads: End of Year giving, Lunch & Learn, iRun, and iCelebrate
- Impact report (July Mailing)
- Charitable giving (Oct. 1st postcard)
- End of Year campaign (Oct-Dec)
- Website updates
- E-newsletter/Social media/Direct mail
- Create a bilingual marketing strategy
- Create needs survey to be handed out at the Back to School Rally
- Meet with superintendent (quarterly)
- Attend Back to School Rally
- Attend Nuts & Bolts Meeting (admins/office managers)
- Attend additional administrative meetings
- Attend GAPS school board meetings at least 2x per quarter
- Add representation on the board for all levels such as elementary, middle school, and high schools

**INITIATIVE:**

Ensure sustainable and exponential gross revenue growth of APSF through enhanced donor giving &

**Action Items****Pipeline & Revenue**

- Grow major gift program through 20 asks of \$5000+ per year
- Conduct 6 meaningful meetings per month with individual donors
- Conduct 60 meaningful prospect visits annually
- Grow our planned giving programs by holding 1 Lunch & Learn event per year
- Develop a new sponsorship booklet by the end of June for event sponsor, scholarship opportunities and the Student Assistance Program
- Secure 8 new matching scholarships
- Secure \$20k in matching Student Assistance Program donations
- Increase grant writing applications & capacity. Submit a minimum of 8-10 grant requests
- Hold video interviews of grant or scholarship recipients (acquire quotes/pics/other) for our “case for support”
- Secure new endowment agreements

## Strategic Plan Meeting Notes January 31, 2020

### Committee Attendees

Joanne Alford - President/Scholarships  
 Suzanne Bodlovic- Vice President  
~~Erik Fedler—Past President~~  
 Bob Stalick – Co-Secretary  
~~Monica Banks-Figueroa—Co-Secretary~~  
 Stephanie Black- Co-Treasurer  
 Elaine Wells- Co-Treasurer  
~~Kimberly Christensen—Allocations co-chair~~  
~~Lynn Hubert—Allocations co-chair~~  
~~Chris Nelson—Events chair~~  
 Cindy Draper - Governance  
 Eric Nelson  
 John Andersen  
 Tracy Day  
~~John Donovan~~  
~~Stephanie Hagerty~~  
~~Lindell Johnson~~  
~~Fred Koontz~~  
 Dave Pautsch  
~~Jeff Precourt~~  
 Lisa Shogren - iSwim  
~~Hynn Winn~~  
 Lindsay Jansen-Hostetler

Melissa Goff – Ex-Officio/ Superintendent

### Vision Statement:

A. Addison went over the difference between a mission & vision (see The Difference Between Vision & Mission paper)

*J. Alford proposed that we keep “The mission of the Albany Public Schools Foundation is to generate and distribute resources that enrich and enhance education opportunities for all students, encourage teachers to implement innovative educational programs, and award scholarship to Albany Public School District students.” And eliminate the rest of the Mission Statement. Thumbs up (agree) = Unanimous for all in attendance.*

### Vision Group Results:

Group 1 = To provide every Albany Public School student the opportunity to achieve their aspirations.

Group 2 = Creating opportunities for all Albany Public Schools student to succeed

Group 3 = Supporting the development of all students to achieve their highest potential

Group 4 = 1<sup>st</sup> option = Helping students realize their potential 2<sup>nd</sup> option = Helping all students realize their potential (regardless of background)

**Most popular statement** = Helping all students realize their potential.

E. Nelson = suggested using Every instead of All.

**Every student recognizes and achieves their potential**

**The agreed upon draft vision statement = “Every student, every opportunity to succeed”**

**Board would like APSF staff to do another GAPS staff survey!**

**Stretch Goal:**

The question is, should we double in five years or triple?

2x – Board agrees to set our goal to 2x’s. To be revisited in a year.

2.5x – Rejected

3x – Rejected

**Deliverables:**

**Culture, People and Process Focused (Group Work)**

1. Make diversity an organizational advantage so we’re representative of our students, teachers, and community. - *(no changes)*
2. Create a written job performance review process. - *(no changes)*
3. Invest in continual learning for staff and board/committee members. - *(no changes)*
4. Have the board do a self-review annually to gauge board engagement. – *(no changes)*
5. Review staff/board/committee job descriptions for all key positions. – *(no changes)*
6. SOP’s for events, programs, and financial tasks. – *(no changes)*
7. Incentives/culture/retain “Attract Retain Develop”- *Added*
  - a. Staff or Board appreciation
  - b. We can do others things besides dollars such as a paid day off on their birthday.

**Impact (Our Product)**

*Change description to – Create a lasting impact that changes students’ lives from the classroom and their success beyond.*

1. Work with GAPS leadership to determine priority needs in early Fall
  - a. Board suggestion changing to early Spring instead of Fall
2. Create a plan to leverage external partnerships to catalyze growth & impact – *(no changes)*
3. Package our “product” through creative marketing strategies
  - a. Create a bilingual marketing strategy
  - b. Handout of GAPS presentations
    - Needs Survey
    - Great Idea – contest?
4. Maintain an ongoing positive working partnership with GAPS Administrators
  - a. Add representation on the board for all levels such as elementary, middle school, and high schools

## **Pipeline & Revenue**

*Notes: Add endowments to our strategy. Should we put teachers and students instead of teachers & students.*

1. Increase grant writing applications and capacity
  - a. Contract a grant writer instead of having C. Muscutt focus on this piece.
2. Grow major gift program through 20 asks of \$5,000 + per year
  - a. Track how many asks it takes to get a gift.
3. 6 meetings per month with individuals' donors
  - a. Keep track of how many asks do you have to get a match (gather stats).
  - b. "Add top qualified donors" to statement (linkage, ability, & interest).
  - c. Change it to 70 annually meetings instead of 6 meetings per month (due to event season).
4. Secure eight new matching scholarships of \$2500 +
  - a. Keep track of how many asks do you have to get a match (gather stats).
5. Conduct 60 meaningful prospect visits annually & associated stewardship (inc. corp sponsors) – ***(no changes)***
6. Grow our planned giving programs by holding 1 Lunch & Learn event – ***(no changes)***
7. Develop a new sponsorship request booklet by the end of June which includes event sponsorship, scholarship opportunities, & SAP matching program. – ***(no changes)***
8. Secure \$20k in matching SAP donations – ***(no changes)***
9. Video interviews of grant or scholarship recipients for ASK or Stand-alone videos – ***(no changes)***
10. Secure more Endowment agreements – ***(added)***
  - a. Part of the 6 meetings per month
11. Scholarship winners to have a lunch with the donor's winter term of the following year. – ***(added)***

## Impact Projections

IMPACT												
								Strategic Plan Goal				
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	Projected 2021-2022	2022-23	2023-2024	2024-25
<b>APSF Impact:</b>												
Classroom grants	\$33,884	\$27,538	\$39,849	\$37,502	\$46,006	\$40,150	\$49,900	\$5,010	\$71,405	\$55,000	\$55,000	\$60,000
Big Impact grant	\$0	\$0	\$0	\$0	\$0	\$14,000	\$15,000	\$0	\$15,000	\$15,000	\$15,000	\$15,000
Special Circumstance grant	\$0	\$0	\$0	\$0	\$0	\$3,000	\$5,470	\$5,000	\$7,000	\$7,000	\$7,000	\$7,000
Enrichment grants	\$0	\$6,500	\$15,000	\$19,945	\$20,125	\$24,000	\$29,098	\$30,000	\$35,000	\$35,000	\$35,000	\$45,000
GAPS(not through our books)	\$0	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000	\$40,000
Other grants	\$416	\$0	\$1,192	\$3,571	\$24,500	\$59,081	\$21,589	\$43,791	\$50,000	\$50,000	\$50,000	\$50,000
Scholarships	\$17,700	\$20,200	\$21,950	\$37,650	\$49,133	\$78,340	\$134,836	\$182,350	\$200,000	\$150,000	\$155,000	\$170,000
SAP - Grant (\$1500)	\$0	\$0	\$0	\$0	\$0	\$0	\$14,798	\$18,000	\$18,000	\$15,000	\$30,000	\$30,000
SAP - Mentor Stipend (\$5000)	\$0	\$0	\$0	\$0	\$0	\$0	\$5,000	\$6,000	\$6,000	\$5,000	\$10,000	\$10,000
SAP - Scholarship (\$2000)	\$0	\$0	\$0	\$0	\$0	\$0	\$40,000	\$56,000	\$60,000	\$80,000	\$80,000	\$80,000
SAP - K-12	\$0	\$0	\$0	\$0	\$0	\$0	\$6,201	\$3,980	\$5,000	\$10,000	\$10,000	\$10,000
								<b>\$390,131</b>	<b>\$507,405</b>	<b>\$462,000</b>	<b>\$487,000</b>	<b>\$517,000</b>
<b>Total Program Payouts</b>	\$52,000	\$94,238	\$117,991	\$138,668	\$179,764	\$258,571	\$361,892	\$390,131	\$417,050	\$445,827	\$476,589	\$509,473
% change		44.82%	20.13%	14.91%	22.86%	30.48%	40%	7.80%	6.90%	6.90%	6.90%	6.90%
												<b>\$517,142</b>