

STRATEGIC PLAN 2015-2020

Revised 2018



Pasadena

EDUCATIONAL FOUNDATION

PEF's Vision Statement

- Every PUSD student will receive an excellent education so that each may reach his or her full potential and become a joyful and fully engaged member of our democratic society

PEF's Mission Statement

- The mission of PEF is to support, enhance, and supplement the programs, initiatives, and priorities of the PUSD

Purpose of Revision/Review

- Actively use plan as guiding document
- Assess specific goals and strategies in light of performance to date
- Invigorate Board commitment to Strategic Plan

Development Goals

- Increase Individual/Business/Private Foundation Giving to over **\$10 million a Year** by 2022
- Build Endowment to \$500,00 by end of plan
- Build Initial Stages of Planned Giving Program
- Continue grant writing to support identified PUSD initiatives

Development—Goal One

- Increase Individual/Business/Private Foundation Giving to over \$10 million a Year from Diversified Sources by 2022 (excluding government grants)

Development—Baseline Data (2013-2014)

- Non-Board Individual: ~\$1.5 million
- Board:
 - Single largest Board donor: ~\$1.6 million
 - Other Board: ~\$50,000
- Businesses and Organizations: ~\$525,000
- Private Foundations: ~\$1.375
- Events: ~\$150,000

- Total Fundraising (excluding government grants):
~\$5.2 million

Development Data 2016-2017/2017-2018

- Individuals: \$2,044,908/**\$626,320**
- Board: \$53,490/**\$68,325**
- Businesses and Organizations: \$581,894 /**\$898,674**
- Events: \$217,190/**\$165,000**
- Private Foundations: \$1,116,823/**\$1,574,375**
- Annual Funds: \$776,603/**\$984,445**

- Total Fundraising (excluding government grants):
~\$4.8/~\$5.2* (Baseline: ~\$5.2 million)

Development—Goal One

Raise \$10 Million a Year By 2022

- Strategies:
 - Annually assess and build Staff and Board capacity to support achievement of goal
 - Hire additional Development Staff to Support audacious goal
 - Plan 50th Anniversary Campaign and begin implementation

Development—Goal One

Raise \$10 Million a Year by 2022

- Strategies (cont.):
 - Prioritize the cultivation of new large individual donors
 - Increase financial support from all existing donors
 - Strengthen relationship with donors through active stewardship efforts
 - Increase Board giving
 - Set annual total Board giving goal
 - Report annual results

Development—Goal One

Raise \$10 million a year by 2022

Strategies (cont.):

- Study alternatives/supplements to Annual Appeal mail campaign; present proposals for adoption as appropriate
- Study alternatives/supplements/enhancements to yearly fundraising event; present proposals for adoption as appropriate
- Annually assess the effectiveness of fundraising efforts and events
- Explore a plan For Sustainable Donors (renewable monthly or yearly giving)

Development—Goal One

Raise \$10 million a year by 2022

- Strategies (cont.):
 - Continue to increase and support giving to Annual Funds
 - Increase current and past PUSD family giving to PEF
 - Increase PUSD staff giving to PEF
 - Establish ad hoc committee to explore ways to increase Corporate donations

Development—Goal Two

- Build Endowment to \$500,000
 - Current endowment: ~\$200,000

Development—Goal Two

Build Endowment to \$500,00

- Strategies:
 - Research best practices for building Endowment
 - Present recommendations to Board
 - Develop and Implement plan for building endowment
 - Assess Staff, Independent Contractor, and Volunteer capacity for effort and increase as necessary

Development—Goal Three

- Build Initial Phases of Planned Giving Program

Development—Goal Three

Planned Giving

- Strategies:
 - Continue to research best practices for implementing Planned Giving Program
 - Present recommendations to Board for initial steps
 - Implement as adopted

Development—Goal Four

- Continue grant writing to support identified PUSD initiatives

Development—Goal Four

Continue Effective Grant Writing

- Strategies:
 - In collaboration with PUSD leadership, identify and establish grant funding priorities
 - Utilize Fund Council to support grant writing
 - Maintain/increase staff capacity to support robust grant writing

Program Goals

- PUSD Support: Work With PUSD to Strengthen PUSD Programs
 - *E.g.*, Athletics, Equity Issues, Innovations, Other Needs
- Summer School: Maintain Success of Summer School Focused on High Quality Enrichment for All Students and Access To High Quality Enrichment for Students with Less Economic Means
- App Academy: Continuous Improvement of APP Academy
- My Masterpieces—Elementary: Maintain and Reinvigorate Elementary School My Masterpieces Program At High Success Levels
- K-12 Arts Program: Support PUSD’s Implementation of Robust K-12 Arts Program
- Robotics: Maintain and Improve Robotics Program
- Teacher Grants: Maintain Teacher Grants at \$100,000 a Year or more
- K-12 Music Program: Support PUSD’s Implementation of a Robust K-12 Music Program
- Math Academy: Grow and Support the Math Academy
- Transition and Sustainability: Track Funding Sources by Program; Seek Diverse Funding Sources; Monitor Sustainability; and Explore Plans for Transitioning PEF Programs to PUSD

Programs—Goal One

- Work With PUSD to Strengthen PUSD Programs

Goal One—Support PUSD Programs

- Strategies:
 - Work closely with PUSD to identify programs and initiatives in need of support
 - Raise funds as necessary to support PUSD initiatives in need of support



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SUMMER PROGRAM

Programs—Goal Two

- Maintain Success of Summer School Focused on Both High Quality Enrichment for All Students and Providing Access To High Quality Enrichment for Students with Less Economic Means

Goal Two—Summer School

- Strategies:
 - Annually assess and build Staff and Volunteer capacity to support achievement of goal
 - Annually evaluate program for effectiveness and sustainability
 - Maintain uniform and high standards for teacher performance
 - Develop measures for evaluating impact of Summer School for students receiving free and reduced lunch
 - Maintain at least 40% participation of free and reduced lunch students each year
 - Work with PUSD to identify need areas for summer enrichment/support



**Acadamy @
Pasadena High School**

Programs—Goal Three

- Continuous Improvement of App Academy

Goal Three—App Academy

- Strategies:
 - Annually assess and build Staff capacity to support achievement of goal
 - Annually evaluate program for effectiveness and sustainability
 - Continuous improvement of excellence in instruction
 - Increase participation by young women and diverse students
 - Track data on participation and report to Board
 - Continue to increase PUSD commitment to program/integration of App Academy into PUSD initiatives
 - Explore avenues for diversification of funding



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MY MASTERPIECES

Programs—Goal Four

- Revitalize commitment to Elementary School My Masterpieces Program At High Success Level

Goal Four—My Masterpieces

- Strategies:
 - Renewed focus on relationships with partners/Revitalization of partners commitment to program
 - Annually assess and build Staff and Volunteer capacity to support achievement of goal
 - Annually evaluate program for effectiveness and sustainability
 - Annually evaluate fundraising needs and sources
 - Identify consistent source of funding for transportation

Programs—Goal Five

- Support PUSD's Implementation of Robust K-12 Arts Program

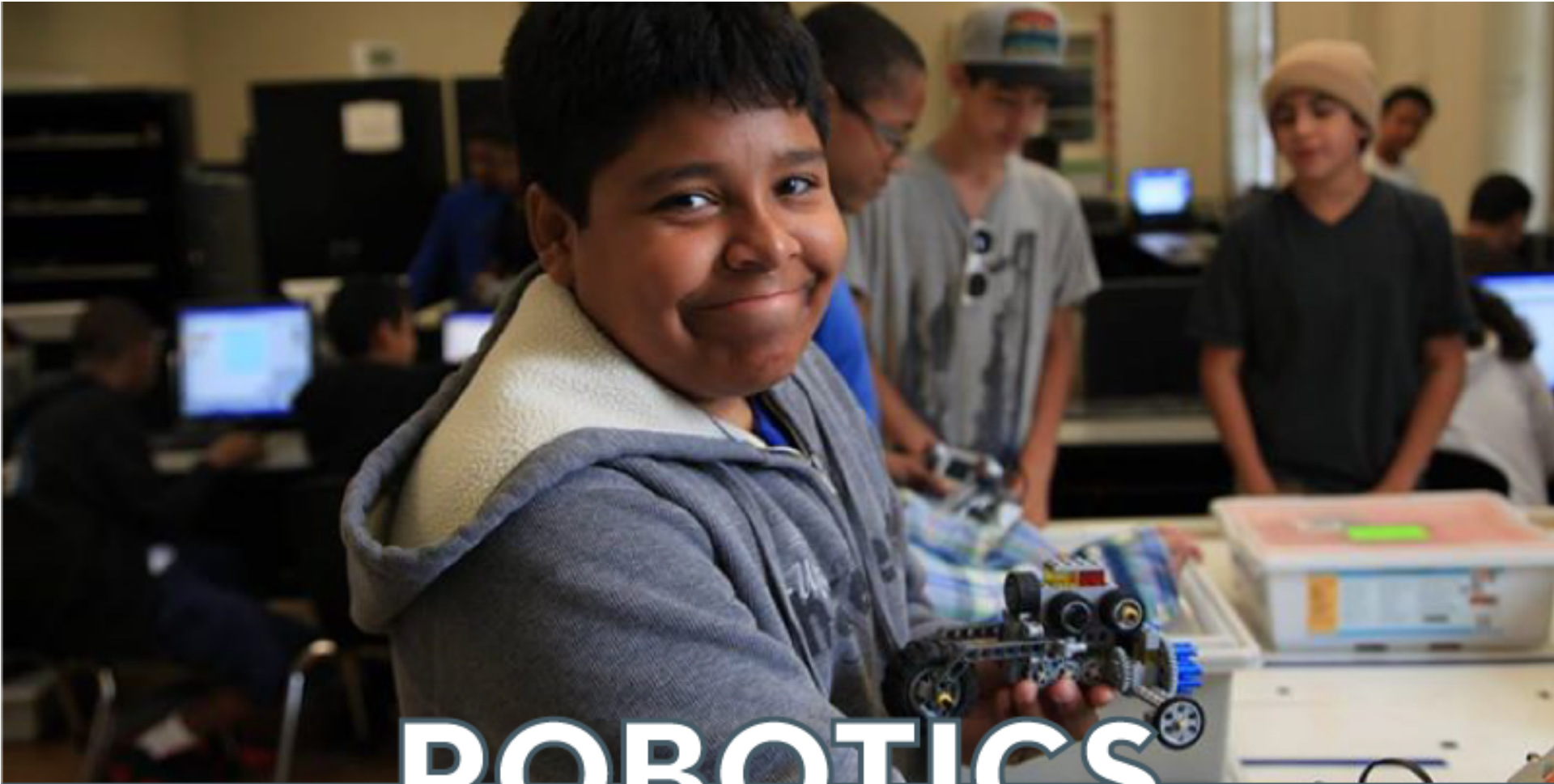
Goal Five—Arts Program

- Strategies:
 - Work with PUSD to develop a robust K-12 Arts program
 - Identify and apply for grants for funding
 - Seek additional private donors for funding
 - Explore expanding My Masterpieces to Secondary level for performing arts



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ROBOTICS

Programs—Goal Six

- Maintain and Improve Robotics Program

Goal Six—Robotics

- Strategies:
 - Annually assess and build Staff and Volunteer capacity to support achievement of goal
 - Annually evaluate for effectiveness and sustainability
 - Establish uniform offerings across PUSD
 - Establish continuity in teacher training and effectiveness
 - Build PUSD commitment to program



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TEACHER GRANTS

Programs—Goal Seven

- Maintain Teacher Grants at \$100,000 or above annually

Goal Seven—Teacher Grants

- Maintain and identify additional revenue sources



MUSIC COUNTS

Get Involved!
www.pased.org

Programs—Goal Eight

- Support PUSD's Implementation of a Robust K-12 Music Program

Goal Eight—Music Program

- Strategies:
 - Work with PUSD to develop a robust K-12 music program
 - Maintain Third Grade violin instruction for all students
 - Seek additional private donors for funding

Programs—Goal Nine

- Grow and Support Math Academy

Goal Nine—Math Academy

- Strategies:
 - Obtain funding sources
 - Build program
 - Serve as backbone/critical partner for long-term success of program within the District

Programs—Goal Ten

- Explore Plans for Transitioning PEF Programs to PUSD and Monitor Sustainability

Goal Ten—Transition and Sustainability

- Strategies:
 - Track funding sources by program
 - Seek diverse funding sources
 - Monitor sustainability
 - Research and analyze potential transition of PEF programs to PUSD
 - Work with Superintendent and School Board on possible transitions
 - Annually report on issue to Board

Community Engagement Goals

- Increase Community Awareness of PEF
- Increase Community Support for PUSD
- Increase Realtor Knowledge of, and Support for, PUSD
- Maintain Principal For A Day At Current Success Levels
- Maintain Lunch with Superintendent at Current Success Levels
- Support Tax Increase Measure as Appropriate

CE—Goals One and Two

- Increase Community Awareness of PEF
- Increase Community Support for PUSD

Goals One and Two—Awareness and Support

- Strategies:
 - Annually assess and build Staff and Volunteer capacity to support achievement of goals
 - Provide consistent and timely communication about PEF and PUSD throughout the community, through website, social media, and press interaction
 - Assist PUSD with its communication efforts as needed and consistent with our capacity

Goals One and Two—Awareness and Support

- Strategies (cont.)
 - Establish and/or enhance strategic alliances with key stakeholders, such as community groups, businesses and community leaders
 - Maintain consistent and recognizable branding of the organization
 - Maintain staff presence at Community Events
 - Increase volunteer presence on School campuses through Ambassador Program
 - Replicate Realtor Initiative outreach with one other community group
 - Regularly gather and report on PUSD successes to Board, donors and community
 - Regular presentations in the community of the “15 Things You Didn’t Know About PUSD”

Community Engagement Goals 3-5

- **Goal 3: Increase Realtor Knowledge of and Support for PUSD**
 - Strategies:
 - Continued implementation of Realtor Initiative
 - Report annually to Board on Initiative accomplishments

- **Goal 4: Maintain Principal For A Day At Current Success Levels**
 - Strategies:
 - Establish metrics for measuring success, record data and report annually on same

- **Goal 5: Maintain Occasional Lunch with Superintendent at Current Success Levels**
 - Strategies:
 - Establish metrics for measuring success, record data and report annually on same
 - Identify strategic opportunities for utilizing lunch

- **Goal 6: Support Tax Increase Measure as Appropriate**

Board Affairs Goals

- Board Full Engagement: the Board will be fully engaged in the work of the organization—as ambassadors, advocates and/or askers and through their own giving—so that the organization can meet its goals
- Strengthen Board Practices and Procedures
- Assess Organizational Structures
- Annually Review Executive Director

Board Affairs Goals and Strategies

- **Goal 1: Board Full Engagement**

- Strategies

- Encourage, memorialize and report yearly on Board financial giving on an organizational level
 - Increase number of Board members leading and/or contributing meaningful volunteer time to support significant initiatives

Board Affairs Goals and Strategies

- Strategies (cont.):
 - Increase the number of strong community leaders serving as active and engaged Board Members
 - Increase the number of Board members giving significant donations annually
 - Increase the number of Board members with corporate connections to procure significant corporation donations
 - Explore Board giving policy
 - Evaluate, adjust as appropriate and implement Board polices regarding involvement and attendance
 - Implement practices for Board members to annually recommit to their Board involvement and engagement

Board Affairs Goals and Strategies

- **Goal 2: Strengthen Board Practices and Procedures**
 - Strategies:
 - Identify best practices for Boards utilized by successful non-profits, including metrics to evaluate the effectiveness of the board and its officers
 - Implement use of term limits for officers
 - Implement use of terms limits for Board service
 - Standardize and consistently conduct New Board Member orientation
 - Implement strategies to align Board Member service with individual skills
 - Evaluate effectiveness, oversight and role of Advisory Groups (*i.e.*, Leadership Council and Fund Council); implement changes as appropriate

Board Affairs Goals and Strategies

- **Goal 3: Assess Organizational Structures**
 - Strategies:
 - Analyze effectiveness of committee structure to ensure Board members are engaged and accomplishing organization goals; make recommendations to Board; implement as adopted

Board Affairs Goals and Strategies

- Goal 4: Annually Review Executive Director
 - Strategies:
 - Consistent and institutionalized review process
 - Timely implementation and completion

Finance Goal and Strategies

- **Goal: Continued and Improved Financial Services Support for the Organization**
 - Strategies:
 - Annually assess Staff resources for accomplishing goals
 - Continue to use best accounting practices
 - Provide regular, clear and easy to understand reports to Board
 - Evaluate and position the finance department for increased transaction capacity
 - Improve the online giving experience
 - Improve reporting between PEF and schools regarding Annual Funds
 - Insure that Annual Funds follow appropriate protocols
 - Improve efficiency in back office operations, including smart and efficient use of additional technology
 - Maintain use of outside management for investments