Spring Foundations Summit 2012 Results

Representatives from the site foundations were asked to identify their greatest challenges and any proposed solutions. They were then asked to mark their level of interest in the challenges. (In other words, if one person identified a challenge that you shared, you would mark that challenge as well. The number in parentheses at the end of each phrase indicates the number of people who also identified with that challenge.)

Greatest Challenges

- Foundation branding; Foundation vs. PTA including increasing the Foundation "image" and better differentiate between Foundation and PTA and conflicting fundraising/over saturation (10)
- Effectively appealing/communicating to parents resulting in participation/involvement (9)
- Communication Issues (excluding parents) (Total 6):
    - with staff and hearing directly from teachers as to whether what you are raising money for is what they need (3)
    - between principals about promising practices at other schools
    - Foundation to school/admin/teacher communication
- Recruiting volunteers (3)
- Unsupportive teachers (2)
- Unsupportive principal (1)
- Computer purchases not being fully utilized due to bandwidth & other technology challenges (1)
- Lack of grant writing skills (1)
- Independent financial review/audit and would like a group rate (1)
- We have no one on a higher Foundation level to ask questions regarding legal issues, bylaws, etc. It would be nice to have a district level entity we could turn to similar to PTA's Palomar Council
- Bookkeeping is too big a job. We need a cloud based version of QuickBooks so bookkeeping can be handled by more than one volunteer at a time.
- Setting a new direction; dropped one fundraising vehicle in 2011 & trying to redesign our emphasis
- Our community is made up of a significant transient / foreign population that are not aware or do not cares to support what the Foundation does. In addition, we are a lower socio-economic community compared to most in the district which makes it difficult to fundraise
- Having the district solicit our funds for itself
- We don't know what we don't know

Proposed Solutions

- Focus time on fewer projects / large profit events to be more successful in raising money and more efficient in doing so (4)
- Consolidating fundraising functions under the Foundations rather than splitting between PTA and Foundation (3)
- Help with advertising events and increase awareness (3)
- Need PUSD to provide easy to understand information on the district financial situation and what the impact has been to individual schools and per pupil spending. This will help us tell the story and get parents to understand because right now most of them are either clueless or in denial (1)
- We'd like to seek more teacher input (1)
- Discounted bulk mailing rates (1)

- Foundation board toolkit. Include templates and samples of everything discussed tonight, bylaws, governance, etc.
- Asking for involvement
- Hardwiring computers
- What has worked at other middle schools
- Capital campaign in the works. Target alumni for donations (high school)

Fundraising Promising Practices
Event Title; Net Amount Raised; Why it's Successful

Representatives from the site foundations were asked to identify what their greatest fundraising effort has been. They were asked to identify the event, indicate the net amount the event raised, and tell why they thought the event was successful. The responses below are organized by type of event. For example, you'll see Direct Asks, Auction Fundraisers, all sorts of A-thons, and Other. Interestingly enough, there was not a single post under Gala events. Gala events were thought be be fun, but may not result in significant fundraising.

Direct Asks

- Park Village Elementary
    - Pledge Drive with Life Lessons (2)
    - $26,000
    - Minimal volunteer time
    - Engaged students

- Deer Canyon Elementary
    - Annual Fund Drive (1)
    - $25,000
    - Asking for specific amount per student

- Willow Grove Elementary
    - Direct Ask
    - In its third year-people expect it
    - Principal and staff support
    - Start early
    - Informative marketing

- Black Mountain Middle School
    - Direct Ask and Raffle at Registration
    - Direct Ask: $6,000; Raffle: $4,500
    - Had a relevant and clear goal

- Monterey Ridge Elementary
    - Direct Ask
    - $28,000
    - Beginning of the year
    - Talented parents

- Turtleback Elementary
    - <u>Pledge Drive</u>
    - $8,000
    - Relatively easy and much less labor intensive to implement
    - No overhead

- Los Pen Elementary
    - <u>Give Big</u>
    - $25,000+

- Stone Ranch Elementary
    - <u>Direct Ask "$1.00 per day"</u>
    - $22,000
    - Brochure to promote with SRES kids
    - Breakdown of where money goes

- Sunset Hills Elementary
    - <u>SOAR (Support Our Academic Resources) Annual Giving</u>
    - $17,000
    - Annual Give

Auction Fundraisers

- Painted Rock Elementary (2)
    - More casual venue
    - Art projects sold as posters
    - Time with teacher
    - Online component

- Tierra Bonita Elementary (1)
    - Stars Auction
    - Consistency – everyone expects it
    - Working with PTA regarding timing
    - Supportive principal
    - Overall support

- Chaparral Elementary (1)
    - Theme
    - Popular Venue
    - Classroom Baskets
    - Multitude of options

- Canyon View Elementary
    - Fun to attend

- Monterey Ridge Elementary
    - Hitting the Streets
    - Dedicated volunteers

- Sunset Hills Elementary
    - Baskets
    - Live Auction
    - Art Show
    - Food Trucks

- Rancho Bernardo High School
    - Online Auction
    - $10,000+
    - Easy

"A-thons" Jog, Read, Spell, etc.

- Highland Ranch Elementary
    - Spell-A-Thon
    - $11,000
    - Easy most parents gave

- Sunset Hills Elementary
    - Jog-A-Thon
    - $10,000
    - Promotes fitness and raises money

- Canyon View Elementary
    - Least amount of work

Other Fundraisers

- Mesa Verde Middle School   (2)
    - Read & Run
    - Very support principal
    - Effective Chair

- Pomerado Elementary (1)
    - Mixed Bag Designs
    - $5,500
    - Good price point
    - Principal and teacher support
    - Fun, original / new
    - Simple
    - Student Incentive=Angry Birds
    -
- Canyon View Elementary
    - Rummage Sale
    - Something new

- Tierra Bonita Elementary
    - Race 4 Cyberspace
    - Principal Support
    - Interactive for kids

- Los Pen Elementary
    - Spring Fling
    - $3,000
    - Silent Auction

- Valley Elementary
    - Cinco de Mayo Trail Run
    - $14,000
    - History/Traction
    - Sizable donations from few key sponsors
    - Returning members who knew what was effective

Questions

When a Foundation partners with and provides program funding to the PTA how does that affect the PTA?
A great example of a site foundation partnering with their PTA is at Sunset Hills Elementary. Gary Burgess, Sunset Hills Foundation President, shares his insights on how the foundation and PTA work together:

"There was some resistance to going to consolidated fundraising at Sunset Hills. This is a big step to make at a school and you need to make sure that you would have buy in from the PTA, Foundation and Principal at the school. I can add a few points that help illustrate why this approach has been effective at Sunset Hills.

(1) We have only four fundraisers each year that we spread-out through the entire school year (Annual Giving Campaign, Jog-a-thon, Gala, Family Action). Parents at the school have overwhelmingly appreciated that reduced number and consolidated fundraisers. We have also seen an increase in fundraising amounts at our school because we do not dilute what we are asking for from families with multiple fundraisers, especially at the beginning of the year.

(2) The PTA still has a membership drive at the beginning of the school year. At our back to school night we show a joint video presentation in every classroom presented by the PTA and Foundation. The focus of the video is our fundraising goals / annual giving campaign and PTA membership. Each parent goes home with an envelope to return their PTA membership and SOAR contribution.

(3) The PTA does not do any direct fundraising efforts (e.g. sell wrapping paper). They do however charge admission for some of their events and programs to help offset costs (e.g. admission to fall carnival, sock hop or talent show).

(4) Our Foundation Board has agreed to fund the PTA programs at the school up to $10k per school year. It is part of the Foundations fixed operating costs. We write this into our fixed financial costs each year. Removing this funding would require a vote by our Foundation Board.

(5) At our school, it is really important to understand that the PTA president at the school is automatically a Foundation Board member. The only way this will work is if the two Boards (PTA and Foundation) cross pollinate. Our Foundation board has 9 members and 4 or 5 of them are also on the PTA board.

(6) A Foundation a registered corporation that needs to be subject to oversight. We have independently audited financial reviews. We highlight in all our fundraising goals that we supply the PTA's

operating budget for important programs (school buses, assemblies…). You can see these funding priorities right on our [Foundation home page](#) .

This is a practice that is working well at our school, but really only worked because the PTA and Foundation just work together. Without working collectively it would never work."

What type of employees are Foundations funding? The top five positions supported by foundations are: Impact Teachers, P.E. Music, Computer and Art.

Have we looked at other districts' earnings? We have researched other districts, but unfortunately there are no "apples to apples" comparisons for our district. This is for several reasons, the primary one being that those that might be comparable in size are an umbrella for their district which means that all of the fundraising for all the schools is rolled up into their "earnings", and therefore we don't actually know how much the district made as opposed to how much the schools raised. Also, several districts include their funds from state and federal grants in their earnings. PUSD on the other hand, only reports its fundraising through philanthropy – i.e. individual and corporate giving. More research on this topic will be done to determine if there are any closer corollaries to PUSD.

Does the district have a policy regarding using social media? Although there isn't a policy in place at this time, one is in the works.

Grant applications are for District Foundation only. How do school foundations provide the grant application information to District Foundation? Rosanne Brown can be the point of contact for the District Foundation. Rosanne can be reached at rbrown@powayusd.com and (858)668-4041. Once provided, the District Foundation can help coordinate among the different school site foundations.

How can we get corporate grants? The answer to this varies by corporation, foundation and need presented. If there is enough interest, this can be a topic for a future summit. In the meantime, the District's Partners in Education program coordinates all of our corporate sponsorships. Cora Bagley is the point of contact for the Partners in Education program; she can be reached at cbagley@powayusd.com or (858)668-4031.

Misc.

Conduct a survey; possible questions include:
- Frequency of meeting and day / time
- Would you like to network electronically i.e. forum, open chat room, etc.
- Would you participate in web conferencing i.e. first Tuesday of month
- Would you attend an annual conference on a Saturday
- Based on survey, want to be grouped based on needs for breakout session

Information to be addressed at the Fall Summit
- Looking for trending data on economic impact on our schools.
- Define socio-economic commonality among Foundations
- Want breakout session with elementary, middle and high schools that feed into each other.

Requests:
- QuickBooks in Mac version – working with Intuit to find out what is available
- QuickBooks online version - working with Intuit to find out what is available
- CPA checklist – Currently posted on PUSDF website

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