

Strategic Plan

2013 to 2015

Approved by the Board of Directors
2013

PiE Mission

PiE raises money to help all PAUSD students reach their fullest intellectual, social, and creative potential.

To Our Valued PAUSD Community Partners,

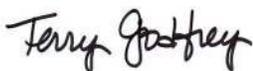
It is with great pleasure that we share with you Palo Alto Partners in Education (PiE)'s new strategic plan. This plan is intended to help shape the activities of PiE as it grows and develops over the next three to five years. We developed this plan with significant community participation, and we thank all who shared their thoughts and views with us, including donors, parents, district and school leadership, community leaders, Advisory Board members, and Board members. This level of community investment in our plan helps ensure that PiE is on track to achieve those goals most needed by the students and families that we serve.

PiE was created in 2005 through the merger of two existing local foundations – Palo Alto Foundation for Education (PAFE) and the All Schools Fund (ASF) – in response to a 2002 PAUSD Board of Trustees decision to equalize funding for every school in the district by disallowing site-based funds for staff salaries. With a sophisticated organization that includes an active 25-member board, a three-member staff, and over 100 volunteers and advisors who represent every school in the district as well as a range of expertise and industries, PiE currently raises more than \$5 million annually through a broad based fundraising campaign.

These precious donated funds are used to support additional caring adults on our campuses in such positions as classroom aides, counselors, technology mentors, and reading, math, science and art specialists at the elementary school level; student counselors, classroom support for writing, literacy and technology, and a broad array of elective teachers at the middle school level; and college, career and guidance counselors, and staff for additional enriching electives at the high school level. We also provide grants directly to teachers to encourage innovation and collaboration. Collectively these investments from our donors help to ensure an excellent education for every student in the Palo Alto Unified School District.

With a focus on enhancing our impact and effectiveness, PiE identified five specific strategic priorities to drive our improvement over the next three years: fundraising, donor stewardship, inclusivity, district partnership and improved infrastructure. These priorities, along with accompanying goals, tactics and success metrics, represent the consensus vision for PiE and its work. The level of cooperation during our process ensures that the plan is “owned” by everyone, and all are responsible for executing it.

We take our logo, with the words “Our Education Foundation,” very seriously at PiE, and we are confident our plan will be a good guide for our organization as we take on new challenges and reach new heights on behalf of the students and families we serve. But we cannot continue to progress without your help. We gratefully acknowledge all of our stakeholders and volunteers who contributed to this plan and to PiE's success. Together, let's make our next eight years as significant as the first eight, so we can continue to make a difference for every child every day in this district. Thank you!



Terry Godfrey
President



Kathy Schroeder
Executive Director

Mission

PiE raises money to help all PAUSD students reach their fullest intellectual, social, and creative potential.

Vision

PiE is committed to educational excellence for every student in the Palo Alto Unified School District (PAUSD). We work in partnership with parents and the community to raise funds to provide an educational experience beyond what is possible with public dollars.

Values

1. **Education Matters** - We believe that a prosperous society has its roots in a strong, well-funded public school system.
2. **Funding Matters** - We believe consistently well-funded schools are able to prepare our graduates to meet the challenges and opportunities of our world.
3. **Partnership** – We join forces with parents, the school district, PTAs, boosters, principals, teachers, students, businesses and the extended community to make PAUSD schools the best they can be.
4. **Equity and Excellence** – We are dedicated to the founding ideals of equality as we strive to provide the best educational experience possible.
5. **Academic and Personal Growth** – We support schools in their efforts to nourish our children’s intellect, self-expression, social skills and engagement with the larger world.
6. **Broad support** – We welcome all donations, large and small, and recognize that broad community involvement sends a powerful message of caring about the growth and future of all children in our public schools.
7. **Volunteer inclusivity** – Volunteers from all backgrounds strengthen PiE and our schools.
8. **Integrity** – Fundraising efforts are conducted with honesty and adherence to the highest degree of ethical standards.
9. **Efficiency** – A foundation run primarily by dedicated volunteers like ours maximizes the contribution to schools and minimizes overhead.
10. **Innovation** – We are committed to innovation in addressing our District’s funding needs, and to facilitating the District’s innovation in teaching.

STRATEGIC PRIORITIES: 2013-2015

In evaluating our strategic position, PiE has concluded that there are five strategic priorities we should address in the next three years. The five priorities are interconnected and interdependent – success in one area will directly impact the success in all others.



The following section of our plan describes in more detail the rationale, three-year goals, and success metrics.

Fundraising

Increase fundraising when compelled by District needs

Rationale and Strategy: During the planning process, questions about potential future funding needs and PiE fundraising growth were examined. Over the past three years, during a time of extraordinary need at the district due to state cutbacks, PiE has nearly doubled the amount of money raised annually and the overall participation rate among parents has grown by a total of 8 percentage points. There have been four primary drivers to PiE’s fundraising growth. First is a compelling case for giving, created by the recession and California’s fiscal crisis together with benchmarking illustrating that PAUSD is well below other similar communities in per pupil spending. Second is PiE’s “ask” amount, which has increased over the years from \$500 to the current level of \$800. Third is the increased participation by parents at all school levels. Fourth, gifts from the Leadership Circle (those giving \$2,500 or more per year) have grown significantly over the past three years, a result of PiE’s strategy to form a Leadership Circle committee focused on these important gifts. Given the current economic climate and needs identified by the district, PiE plans incremental growth of 10% or lower in its fundraising during the next three years. **We will focus on achieving our rational fundraising goals and positioning PiE to have the capacity and systems to raise substantially more money, as and if needs grow.**

- Goals**
1. PiE annually meets our campaign goal, expected to increase at least slightly each year, during the three years of this plan, while maintaining goodwill and positive associations with the District, schools, parents, teachers, and other key partners.
 2. PiE is carefully positioned with the necessary capacity and systems to raise substantially more money, as and if needs grow.

- Success Metrics**
1. Overall growth in dollars raised
 2. Overall growth in participation rates
 3. Leadership Circle gifts remain a balanced and sustainable portion of total PiE fundraising

Stewardship

Improve stewardship and accountability to donors

Rationale and Strategy: Focus group input suggested that how PiE thanks and stewards donors at all levels is a key growth area for our organization. We define donor stewardship as communicating impact, connecting with donors through multiple channels and experiences, and deepening donor affiliation for and investment in PiE. Improving our efforts in these areas is paramount to providing an excellent experience for all donors, increasing gifts, retaining donors, sustaining a strong positive reputation, and growing our fundraising program over time. We will explore ways to communicate and engage with donors outside of the “ask” period, continue to develop opportunities to engage donors and Leadership Circle members in meaningful ways, and improve our process for collecting data and communicating the investment and impact of PiE dollars. **PiE will build robust practices that more systematically and effectively acknowledge, engage and build lasting relationship with all donors.**

Goals

1. PiE donors at all levels describe an exemplary donor experience.
2. LC donors describe a close and meaningful relationship with PiE.
3. PiE annually improves retention of parent and community donors.

Success Metrics

1. Donor satisfaction rating (to be derived by annual donor survey)
2. Donor retention rate
3. Increased volunteer rates (more people volunteering for PiE)
4. Documented and sustainable recognition and stewardship program
5. Balance of marketing materials that ask for funds versus showcase impact

Inclusivity

Expand our efforts to be inclusive and reflective of our entire community

Rationale and Strategy: We know that our community is changing and becoming increasingly diverse and yet, PiE leadership (board), and to a lesser extent donor base, does not fully reflect the changing demographics. Nearly every focus group and interview identified this as critical for PiE to address in the next three years. From a donor perspective, there are a variety of barriers we must address such as different philanthropic traditions, educational experiences, language, financial means, and educating people moving to our state about the need public schools have for philanthropic support. We believe our PiE Chairs and Advisory Council are key levers to achieving greater inclusion. PiE Chairs as a group are more diverse and their focus on high participation at their school provides greater personal connection and knowledge of the entire parent community. The Advisory Council connections to a broad swath of the Palo Alto community offer additional outreach and inclusion opportunities. **We will work with these two groups to identify what we need to do differently and how together we can appeal to a more inclusive donor base.** In terms of the board, we recognize that some of our structure and practices may create barriers to participation. **We will systematically examine those, making the necessary changes to allow greater participation.**

Goals

1. PiE has a deep understanding of our donor and prospect populations and our fundraising, solicitation and stewardship practices appeal to and embrace all families in the District.
2. PiE effectively raises funds from all demographics in the District.
3. The overall PiE volunteer team better reflects the student body with respect to representation by zip code, ethnicity and gender.

Success Metrics

1. The PiE volunteer team reflects the student body demographics
 - Board Diversity (ethnicity, and school clusters)
 - Volunteer Diversity (gender, ZIP code, school clusters and ethnicity)
2. Board gender diversity
3. Donor diversity, as much as this can be measured (e.g. ZIP codes and school clusters)
4. Participation rates
5. Diversity in messaging to donor segments

District Partnership

Deepen our strategic partnership with the Palo Alto Unified School District

Rationale and Strategy: PiE's mission and success is directly tied to the Palo Alto Unified School District's vision and success in providing an excellent education for all students. As PAUSD embarked on its own strategic planning process in 2013, this presented an important opportunity to deepen and strengthen our relationship as a valued strategic partner. PiE's ability to tap into the generosity of parents and the community to help provide an excellent educational experience for all students is dependent on the District's ability to articulate a clear and compelling vision for outcomes for students in Palo Alto and identify the strategic funding role PiE will play in achieving that vision. **PiE will seek to be an active participant in PAUSD's planning and plan implementation process and assist the District in translating its vision to the broader community while raising funds to support it.**

Goals

1. PiE is a true community partner with PAUSD. The two organizations routinely collaborate to articulate PAUSD's vision emanating from the District strategic plan.
2. PiE's critical role in achieving PAUSD's vision is executed through effective fundraising and community outreach efforts.
3. Public and private fundraising for PAUSD are well coordinated and well executed.
4. PiE champions its core values throughout our work with the district.

Success Metrics

1. Integration and specific mention of PiE-related goals into the District's strategic plans
2. Invitations to key meetings and the depth, quality and comprehensiveness of discussions and topics between PiE and District Leadership
3. PiE board and District staff/board satisfaction rating in terms of relationship/mutual commitment (from annual survey)
4. Donor satisfaction rating in terms of accountability and understanding PiE impact (from annual donor survey)

Infrastructure

Invest in, improve and optimize our infrastructure

Rationale and Strategy: With PiE's growth over the past three years and the creation and implementation of this strategic plan, it will be critical to ensure adequate resources to sustain our quality and fuel our growth. Currently, PiE spends a smaller percentage of its overall budget on operations and fundraising than many similar education foundations and fundraising organizations, reflecting our commitment to remain prudent and thoughtful about infrastructure investments. **As we move forward, we will assess and evolve our Board, staff and volunteer structures and make strategic investments in staff, technology, and policy and procedure documentation to allow us to successfully execute our plans and achieve our fundraising goals.**

Goals

1. PiE evolves and invests in our structure and staffing as necessary to most efficiently achieve our mission, vision, strategic priorities and fundraising goals.
2. PiE attracts and retains dedicated, high quality Board members, staff and volunteers by providing a great experience and work environment.

Success Metrics

1. Board/volunteer satisfaction rating
 - Experience
 - Resource availability
 - Clarity of expectations
 - Support availability
2. Board, staff and volunteer retention
3. Donor experience
4. Recurring operating expenses not to exceed 10% of revenue in normal operating years

Thank you!

Thank you for reading this strategic plan. We believe that these goals collectively will help make PiE more effective and more efficient in carrying out its mission. As PiE does not work in a vacuum, we welcome your feedback. Together, PiE and the PAUSD schools community make the education available to every PAUSD student better every day. Together, we are working to improve the lives of PAUSD students and the successes of its graduates. Together, we make a difference for all of our kids and our schools.