



**Strategic Plan Executive Summary**

**2017 - 2024**

**Approved by the Board of Directors  
March 2017**

**Extended to 2024 – April 2022**

## INTRODUCTION

Palo Alto Partners in Education (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). It is the only non-profit educational foundation devoted exclusively to raising money for all Palo Alto Unified School District (PAUSD) schools, and the only foundation dedicated to raising funds to pay for PAUSD teachers and staff. We work with parents, the school district, and the community to provide all students an enhanced educational experience. PiE is the district’s essential partner in providing support and enrichment opportunities that help every child receive a well-rounded, fulfilling education from PAUSD. We distribute funds on an equal per-pupil basis at each school level throughout the district. During the 2015-16 school year, PiE raised over \$6.1 million.

PiE has a Board of 30 active members who fulfill both governance and operational functions. We have a small three-member staff that includes a full-time Executive Director, a part-time Deputy Director, and a part-time Development and Campaign Manager. In addition to the Board and staff, we have a robust sophisticated network of over 100 volunteers and advisors engaged in a wide variety of PiE activities. They represent the schools in the district as well as a range of expertise and industries.

From this position of organizational strength, the PiE Board and staff sought to create a new strategic plan to guide our work through 2020. Our organization last engaged in a comprehensive planning process in 2012-13. That plan took a contextual approach, focused on how to better implement PiE’s mission, continue to raise more money year over year, and enhance management capacity, continuing to accomplish these goals without adopting any radically new approaches.

## STRATEGIC PLAN PROCESS

As we began this planning cycle in spring 2016, we engaged in an analysis of PiE’s current situation and determined the following.

1. As we celebrated our 11<sup>th</sup> year, PiE is trusted and respected among Palo Alto public education stakeholders (donors, principals, district leaders, etc.).
2. PiE’s “brand equity” includes a steady state, dependable, great service, and service oriented. While our donors generally believe their gifts to PiE contribute to the quality of education in Palo Alto and their school, there is a lack of clarity about what specific difference PiE makes.
3. Historically, contributions to PiE have increased each year. While this continues to be true, in recent years there has been a slight downward trend in number of participating families, with more dollars coming from fewer families.
4. We made significant strides since the last strategic plan in growing our top level of donors (Leadership Circle). We recognize that many of our Leadership Circle donors are PiE founding Board members and long-time donors who are “graduating” from the district. A key question in this planning cycle was how to engage new families and new top tier donors to ensure PiE’s contribution to the District remains strong and we continue to enhance the education of every student.

Against this background, the strategic planning process focused on whether PiE should dramatically change its mission and focus to energize its donors and grow larger contributions. Revolutionary approaches were explored, considered and debated. After careful consideration and discussions with a

variety of stakeholders, the Board determined that its purpose—to raise money from parents and the community to provide all Palo Alto Unified School District students an educational experience beyond what is possible with public funding—continues to be relevant and critical to the community we serve. At the same time, we identified several strategic changes we need to implement over the next three years to ensure PiE achieves its mission, inspires donors, and continues to make a meaningful difference to all students in PAUSD. This strategic plan captures those strategic imperatives.

The contents of this document were developed with the leadership of VP of Strategic Planning, Jenny Stein (the Board appointed this one-year position to have a director focused almost exclusively on strategic plan development), and Executive Director, Linda Lyon, in collaboration with an eight-member strategic planning committee comprised of PiE Board leadership and members. PiE’s Vice Presidents and the entire Board were also deeply engaged in discussions and decision-making. Strategic Planning Consultant, Nancy Ragey, facilitated the process. The following were the major steps of our process:

- **April 2016:** the Board and staff created a list of critical issues that we felt needed to be addressed by the plan. Research was conducted over the summer that included review of relevant documents and stakeholder studies from the past three years, benchmark comparisons with like districts around the county and other California education foundations, and selected interviews with key stakeholders.
- **September 2016:** A seven-month planning process was developed.
- **September – December 2016:** A series of work groups formed to explore new strategies including PiE’s target funding areas, a potential focused side fund, the organization's philosophy about parity in its giving, and appropriate metrics.
- **December 2016:** The Board held a second planning session to agree upon overarching goals and priorities based on recommendations from the work groups.
- **December 2016 to February 2017:** Based on Board output from the second planning retreat, the strategic planning committee did additional work to hone the priorities and develop a set of potential key actions that would support plan implementation.
- **March 2017:** Metrics were developed to allow the Board to mark progress over time and a written strategic plan created. The Plan was approved at the March meeting
- **Going forward:** Using the strategic plan as a roadmap, PiE committees will develop annual plans that support the strategic priorities. The Board will revisit the plan and associated metrics at least annually, making mid-course corrections as necessary.

The new set of priorities and goals represent the consensus vision for PiE and its work. The extraordinary level of cooperation during our process ensures that the plan is “owned” by everyone, and all are responsible for executing it. We are confident that it will be a good guide for PiE as we take on new challenges and reach new heights on behalf of the students we serve.

We gratefully acknowledge all of our stakeholders, volunteers and Board members who contributed to this plan.

Colleen Gormley  
President

Jenny Stein  
VP of Strategic Planning

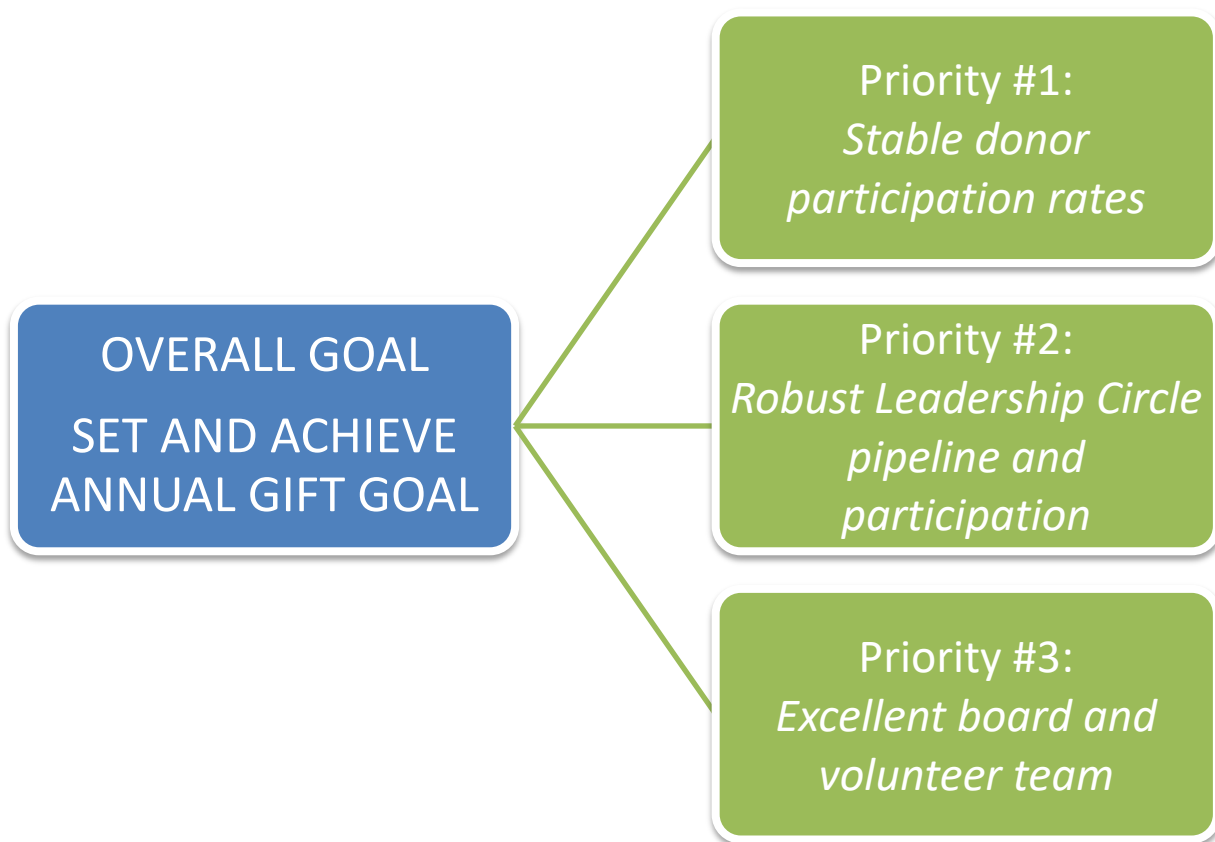
Linda Lyon  
Executive Director

## PIE'S STRATEGIC PLAN EXECUTIVE SUMMARY

### PIE'S GUIDING PRINCIPLES: MISSION, VISION AND VALUES

<b>Our Mission</b>	PiE raises money from parents and the community to provide all Palo Alto Unified School District students an educational experience beyond what is possible with public funding.
<b>Our Vision</b>	PiE's volunteers, in partnership with parents, schools, and the community, will ensure every student in the Palo Alto Unified School District experiences an enriched and fulfilling education.
<b>Our Values</b>	<ul style="list-style-type: none"> <li>• <b>Education Matters</b> – We believe that a prosperous society has its roots in a strong, well-funded public school system.</li> <li>• <b>Funding Matters</b> – We believe consistently well-funded schools are able to prepare our graduates to meet the challenges and opportunities of our world.</li> <li>• <b>Partnership</b> – We join forces with parents, the school district, PTAs, boosters, principals, teachers, students, businesses, and the extended community to enhance Palo Alto Unified School District schools for all students.</li> <li>• <b>Equity</b> – We are dedicated to the founding ideals of equality as we strive to provide an enriched education to all Palo Alto Unified School District students.</li> <li>• <b>Academic and Personal Growth</b> – We support schools in their efforts to nourish our children's intellect, self-expression, social skills, and engagement with the larger world.</li> <li>• <b>Broad Support</b> – 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.</li> <li>• <b>Volunteer Diversity</b> – Volunteers from all backgrounds strengthen PiE and our schools.</li> <li>• <b>Integrity</b> – Fundraising efforts are conducted with honesty and adherence to the highest degree of ethical standards.</li> <li>• <b>Efficiency</b> – A foundation run primarily by dedicated volunteers maximizes the contribution to schools and minimizes overhead.</li> <li>• <b>Innovation</b> – We are committed to innovation in addressing our District's funding needs, and to facilitating the District's innovation in teaching.</li> </ul>

**PIE'S THREE-YEAR STRATEGIC PRIORITIES**



Elevate the PiE Experience: Sustain **trust**, enhance **excitement**, communicate **impact**

**SUCCESS METRICS TO BE MEASURED OVER TIME**

	2017	2018		2019		2020	
Metric	Baseline	Actual	Score	Actual	Score	Actual	Score
1. Dollars Raised Annually							
2. Total Number of Donors							
3. Total Number of New Donors							
4. Overall Donor Satisfaction with PiE <sup>1</sup>							

**Scoring**

	We are on target and should proceed as is.		We are making progress but are falling somewhat short of expectation.		We are off target and must make a significant mid-course correction or re-think our strategy.
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<sup>1</sup> Based on annual donor survey; scale 1-5, 1 = very dissatisfied, 5 = very satisfied  
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