

EdUCate!



Strategic Plan

2005 – 2010

UNIVERSITY CITY FOUNDATION FOR PUBLIC SCHOOLS
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PRESIDENT'S MESSAGE

In many cultures, early adolescence is a time for celebration of a child's coming-of-age. It is a time of great anticipation of, and commitment to, a meaningful future for that child, by the family and the community. As we enter EduCate's thirteenth year, we, the Board of Directors, the five public schools of University City, and our greater educational community renew our commitment to the future of our children with a new five-year strategic plan.

The process began with structured feedback from a cross-section of our stakeholders: parents, faculty, administrators, and community members. This was followed by a comprehensive discussion of all issues by the Board of Directors and then distilled into this document by the Strategic Planning Committee of the Board.

Thanks are due to many individuals. First, we continue to be grateful to the founders and longtime volunteers of EduCate! who inspire us with their vision of collaboration and inclusiveness for education in this community. We also continue to be indebted to the teachers, staff, and administrators at each of our schools who always support us, and who bear the ultimate responsibility of making good use of the Foundation's funds in the classroom. Finally, special thanks to Rashmi Bhargava and Cheryl Creagh, who were primarily responsible for ensuring that this project was carried out comprehensively and with great care.

Respectfully,

R. Elaine Hanson MD, President

September 2005

OUR CORE

Guiding Principles: *Our guiding principles express our core beliefs and are the reason EdUCate! was founded.*

- ▶ Our five University City Schools continue to collaborate, creating an innovative base for learning.
- ▶ High quality public schools, based on inclusiveness and democratic principles, are fundamental to educating our youth.

Values: *Our core values describe how we will act in order to accomplish the tasks leading to achieving our mission. They create the desired culture as they guide the behavior of all members of EdUCate!*

▶ EXCELLENCE

Our communications and events are of the highest quality.

▶ TEAMWORK

We work most effectively by consensus in a cooperative, respectful, and enjoyable atmosphere.

▶ SUCCESS IN ACHIEVING GOALS

We are focused, realistic, organized, and energetic. We are flexible *and* willing to take intelligent risks. We are creative and farsighted in achieving our goals.

▶ HIGH ETHICAL STANDARDS

We are committed to honesty, integrity, and fairness in our relationships among ourselves and with our stakeholders.

Mission: *Our mission statement expresses the reason EdUCate! exists. It identifies who our “customers” are and what we produce as outcome benefits for them.*

The University City Foundation for Public Schools improves the quality of our children’s education by providing supplemental resources to University City public schools.

Vision: *Our vision statement describes the hopes, dreams and aspirations of EdUCate!*

- ▶ To be a technologically up-to-date, easily accessible, and responsive organization, which is automatically identified as *the* foundation for the University City public schools.
- ▶ To be identified as a leader in facilitating school cooperation and collaboration, enhancing not only our ability to raise funds, but also the effectiveness and efficiency with which those funds are used.
- ▶ To foster a productive, efficient, excellent educational community, involving all partners in education.

STRATEGIC ISSUES

The strategic issues identified by the Board and our stakeholders are:

- ▲ **Marketing**
- ▲ **Financial Development**
- ▲ **Allocations**
- ▲ **Organizational Infrastructure**

Core Strategies: *Our Core Strategies, based on Board- and stakeholder-identified strategic issues, are the primary means and methods we will use to guide EdUCate! as we work to realize our **Vision for 2010**.*

▶ **Strategy 1: Marketing**

Develop and implement a marketing campaign to include a new tag line.

(From generic marketing with the EdUCate! name to improved brand recognition with a tag line and featured projects.)

- a. Develop a tag line that captures our vision and attracts support
- b. Develop an annual theme/project
- c. Increase contact with stakeholders and donors with an improved and more widely publicized website
- d. More aggressively pursue sponsorships for main events using the collaborative projects/themes
- e. Update/improve the VIP event with special nametags/visual aids connecting to our tag line and theme
- f. Have a Board member at every school/parent function to reiterate and solidify our position as the school's foundation
- g. Strive to have each Board member bring one new VIP-level donor to TOT each year

▶ **Strategy 2: Financial Development – Fundraising**

Develop and implement an Annual Appeal as part of our fundraising program.

(From fundraising that is almost exclusively event dependent to one that also draws significantly from the wider UC community, alumni, and business in a regular, more predictable, and more efficient way.)

- a. Develop an annual appeal with a targeted audience, clear strategy, and specific and realistic goal
- b. Determine the need to contract out specific parts of the Appeal
- c. Develop alumni database and contacts
- d. Develop a succinct and convincing case statement
- e. Develop a succinct and readable history of the organization
- f. Facilitate schools in developing projects/themes that are: amenable to grants; attractive and marketable to a larger number of donors, businesses and foundations

► **Strategy 3: Financial Development - Review and Maximize Existing Programs**

Evaluate existing programs and events to assure that each is functioning maximally to support our mission.

(From current events and programs which only partially reach our targeted donors to better-marketed and more accessible programs which provide more and easier opportunities for philanthropy.)

- a. Evaluate TOT ticket price and options for silent auction
- b. Evaluate Friendraiser and 5k
- c. Pursue better teacher support and participation
- d. Redesign goals of, and access to, Teacher Wish lists to fund classroom supplies, equipment, etc. that previously dominated many of the grant requests
- e. Evaluate and improve “Honor-A-Teacher” program
- f. Update the database, investing in appropriate hardware, software, and training

► **Strategy 4: Financial Development - Endowment**

Develop and implement an endowment policy that reflects the values of the foundation.

(From the current endowment process to one with a more clearly defined strategy to ensure the maintenance and survival of EdUCate!.)

- a. Clarify the investment strategy
- b. Propose an endowment goal
- c. Clarify plans for the disposition of investment income
- d. Market contributions to the endowment with a clear statement of purpose

► **Strategy 5: Allocations**

Amend the allocations process to facilitate greater collaboration within and among the five University City schools.

(From a process which is based exclusively on individual teacher/staff-written grants to one which identifies common themes and promotes collaboration within and among schools.)

- a. Determine best methods for seeking, facilitating, and eventually requiring collaboration with newly raised and requested funds, and develop a new allocations process supporting that goal
- b. Meet with principals, staff and community to explain, and ask for assistance with, the collaborative strategy
- c. Meet with principals and selected staff to identify themes and collaborative projects
- d. Develop a transitional process for grant-writing and allocations
- e. Meet with principals, department chairs, and faculty leadership to identify: how best to communicate with staff; how best to utilize currently available staff development time to educate staff about goals; discuss transitional grant-writing process
- f. Enhance the Teacher Wish List program to assume the role of providing classroom supplies, equipment, etc. that previously dominated many of the grant requests (see Strategy 3, D)
- g. Determine best methods for seeking, facilitating, requiring collaboration with *existing* resources, and explore methods to facilitate sharing
- h. Hold biannual stakeholder meetings to maintain communication and assess progress

▶ **Strategy 6: Organizational Infrastructure - Website**

Develop the EdUCate! website to facilitate and support philanthropic opportunities.

(From an informational resource to a full service, regularly updated access point to all of EdUCate!'s events, schedule, and philanthropic opportunities.)

- a. Work with a consultant to devise methodology to update the website regularly
- b. Develop a system to put an expanded form of the Teacher Wish List on the site (akin to a wedding registry)
- c. Investigate the technical and financial advantages and disadvantages of online donations, ticket purchases, and other transactions via the website
- d. Investigate and invest in appropriate technology (hardware and software) to support our mission

▶ **Strategy 7: Organizational Infrastructure – Board Support**

Develop support and resources for our board members.

- a. Design a Board Governance Committee to replace the Nominating Committee, which will provide orientation, self-evaluation, and educational information to the Board, in addition to nominating new members
- b. Support the hiring of assistants and consultants as needed for new projects
- c. Assess the desirability (risks/benefits) of an Executive Director
- d. Expand our key subcommittee membership in the community
- e. Develop a more intimate and inclusive relationship with school liaisons (i.e. develop ambassadors; consider liaison attendance at Board meetings, in a nonvoting capacity)
- f. Amend the bylaws to designate a standing Strategic Planning Committee which continues to update the plan and maintain progress

KEY SUCCESS FACTORS

Our Key Success Factors measure how effectively EdUCate! is achieving our Mission, Vision, and reflecting our Values on a year-by-year basis.

▲ Marketing

- Tag line
- Case statement
- Annual theme or project
- Enhanced VIP activity and participation
- Board attendance at all school/parent functions
- Increased participation by faculty

▲ Financial Development

- Income
- Annual appeal with appropriate case statement, targets, and goal
- Alumni database
- Increased corporate support
- Clear endowment plan

▲ Allocations

- New allocations documents supporting collaborative goals
- Clear transition plan to new format
- Enhanced Teacher Wish List
- Clear plans for educating applicants regarding collaborative goals
- A “facility” or clearinghouse for organizing and developing cooperative use of resources already in the schools
- Regular meetings with principals and designated school representatives

▲ Organizational Infrastructure

- Up-to-date and fully functional website
- More workable database (including alumni) that is easy to use and easy to transfer and maintain
- Teacher Wish List registry
- Effective Board Governance Committee (board membership uniformly feeling more involved, educated, and effective)
- Effective school ambassadors
- Regular reports on the strategic plan
- A Strategic Planning Committee

PRIORITIES

▲ 2005-2006

- ▶ **Strategy 1: Marketing**
 - Begin theme process for 2006-2007, meeting with principals, selected faculty
 - Board member at every school function
 - Develop tag line

- ▶ **Strategy 2: Financial Development – Fundraising**
 - Alumni liaison/database
 - Case statement
 - Improved database
 - Investigate annual appeal consultant
 - Organization history

- ▶ **Strategy 3: Financial Development - Review and Maximize Existing Programs**
 - Finalized strategic plan
 - Enhanced VIP reception
 - Evaluate Friendraiser/5k
 - Proposal to redo Teacher Wish List design
 - TOT ticket price

- ▶ **Strategy 4: Financial Development - Endowment**
 - New endowment plan

- ▶ **Strategy 6: Organizational Infrastructure - Website**
 - Website update and investigation of online giving/ticket r/b

- ▶ **Strategy 7: Organizational Infrastructure – Board Support**
 - Board Governance bylaw amendment and committee
 - Improved school liaison participation

▲ 2006-2007

- ▶ **Strategy 1: Marketing**
 - Biannual stakeholders meeting

- ▶ **Strategy 2: Financial Development – Fundraising**
 - Alumni database
 - Annual appeal plan

- ▶ **Strategy 3: Financial Development - Review and Maximize Existing Programs**
 - Theme for TOT fundraising

- ▶ **Strategy 5: Allocations**
 - “Sharing Resources” plan
 - Transitional allocations process

- ▶ **Strategy 7: Organizational Infrastructure – Board Support**
 - Active Board Governance Committee with education, evaluation, support plans