

CCEF LINK

California Consortium of Education Foundations

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We hope that members of the LEF community will contribute to this newsletter. If you have written, or would like to write, an article that would be of interest please contact CCEF.

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CIVIC ENGAGEMENT—SOMETHING NEW?

by **Caroline Boitano, President, CCEF Board of Directors**

There continues to be a growing interest in education foundations in California today. And while the interest is stimulated by the greater need for funds that all districts face, it is becoming apparent that education foundations, with their dedicated volunteers and committed parents, are a significant resource for schools and that they offer more than dollars. Education Foundations can be the vehicle for greater civic engagement.

What does this mean? The education foundation with its programs, its people and, indeed, its fundraising, brings people together with schools as the focus. They become the “public face” for what is happening in schools. In challenging times, this becomes even more important. The people who support education foundations and work to develop them, want more! They don't accept the status quo. And they understand the maxim “If you want things to get better, get involved.”

These dedicated people not only get involved themselves, they involve others. They involve the people who are approached for funding. They involve the teachers and school administrators who are partners in this effort. They involve the school board by demanding accountability and questioning decisions. They involve the community by telling the stories that bring people to a greater understanding of how schools are doing, good and bad. Through this process of involvement, they become the leaders, the friendly critics sometimes, and always the advocates for kids. Civic engagement is most effective at a very local level. And schools are always very local. Is this new? Not really, but it is now more important than it has ever been.

AS BUDGET CUTS THREATEN SCHOOL PROGRAMS, SIERRA FOOTHILL MOMS

TAKE A HIKE [\(TOP\)](#)

Contributed by Moms on the Move



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APPLE AWARDS [\(TOP\)](#)

CCEF invites all local education foundations and affiliated organizations to submit an innovative, successful, exciting activity or program for the 2003 Apple Awards.

In addition, LEFs are also encouraged to submit innovative & successful fund raising activities, public relations efforts, or board development/administrative inspirations.

Selected programs will be highlighted at the CCEF Annual Training Conference, Nov 6-7, 2003, in San Jose.



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BOARD RETREAT: AN ESSENTIAL ELEMENT OF FOUNDATION SUCCESS [\(TOP\)](#)

by Susan Sweeney, CCEF Executive Director

"If you don't know where you are going, it doesn't matter which way you go." Indeed! The words of the Cheshire Cat in Lewis Carroll's Alice in Wonderland.

Whether beginning or established, site based or serving a district, suburban or rural, all local education foundations benefit from a yearly board retreat. It is often the one time each year when board members can meet in an unrushed, informal way to reflect on the organization's growth and plan for the future.

At different times the focus of the retreat may differ. The focus may be on developing a strategic plan or a framework for the board's operation; it may be on building infrastructure and developing the skills of board members; and at other times, the retreat is an opportunity to educate the board in preparation for new programs or important future decisions. In all cases, a board retreat provides an important opportunity for board members and staff to get to know each other in a more multidimensional way and to learn the basic differences in their respective roles.

Board retreats are often held on a Saturday or at the end of the workday to provide time to consider issues in greater depth than at a two-hour board meeting. Traditionally, a facilitator is engaged to orchestrate the retreat activities so all members of the board can relax and participate.

A board retreat is a time to take stock. A chance to celebrate accomplishments. It is also a time to revisit your mission statement and revise or reaffirm. It is a time to re-examine or develop a vision and values statement for your foundation.

For many foundations, the board retreat is a chance to plan for the coming year. Carol Sigelman, Keylink Consultancy and CCEF Board Member, shared the following chart that she uses with groups during annual planning:

FUNDRAISING AND RESOURCE DEVELOPMENT SAMPLE STRATEGIC PLAN

| Goal: Increase total funds raised in 2003 by 25% | | | | |
|--|---|--|----------------------|---------------------------------|
| Objectives/Strategies | Actions/Tactics | Responsible | Deadline/Due Dates | Outcomes |
| Double donor enrollment | Educate potential donors Annual report Present needs at sport/parent mtgs | Committee | Back to school night | <i>(describe what happens!)</i> |
| Increase participation at fundraising events | Publicity Word of mouth | All board members | Ongoing | |
| Increase business and corporate sponsorship | Identify community resources Determine benefits to sponsors | Business partners Community liaison | End September | |

| | | | | |
|--|-------------------------------|--|--|--|
| | Create presentation materials | | | |
| | Write cover letter | | | |

It is important to refer back to your these charts and your strategic plan throughout the year to mark your progress in various areas

The San Carlos Education Foundation's recent retreat, organized by President Elect, Carrie Du Bois, incorporated many of the elements we have discussed and added some new ones. The group met on Saturday at a conference room at the San Mateo County Office of Education. The program for the day included a brief history of the growing foundation movement statewide as well as the history and growth of the San Carlos Education Foundation. Guest speaker, Kay Sprinkle Grace, noted author and fund development expert, prepared the board for today's challenges of fund development in these times of budget crisis for public schools. Kay focused on the specific strengths and challenges of the San Carlos Education Foundation. Following an informal box lunch, a small group exercise helped LEF leaders get to know each other, an important step in the planning process. The group celebrated the year's accomplishments and discussed the challenges and plans for the future. The day concluded with a presentation and informal discussion with a panel of local education foundation presidents from neighboring communities who have similar and successful LEFs.

When planning for next year's board meetings, include a retreat and get the date on everyone's calendar right away. The payoff to your foundation will be well worth the effort and the time spent.



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HOW TO APPROACH PRIVATE FOUNDATIONS, FUNDRAISING TIPS FOR LEFs [\(TOP\)](#)

Some private foundations only accept proposals in response to their invitations and initiatives. Usually, these are called "operating foundations;" that is, they use their endowment income to pursue projects determined by their board of directors and do not encourage voluntary applications from others. Descriptions In the Foundation Directory, for example, often contain this caution: Unsolicited proposals not accepted.

If the foundation has a history of funding issues/projects similar to yours, send a brief letter, not a proposal. The letter explains that their organization and yours have something in common—you both share a deep concern about (pick a topic: aging, drug abuse, battered women). Include a brief description of your organization along with a one-page bulleted list of major initiatives or accomplishments. Conclude by saying that since this topic is so crucial, you want to share your activities with others who hold the same values.

The outcome? About one-third of the time, you get a letter back saying they didn't know about you and you are invited to submit an application. You never hear from the others. Their message is clear; they have their own priorities and any further attempts to approach them would be a waste of time.

Grant seeking is a contact sport, especially when approaching private foundations. When relationships exist between your board and a private foundation, it will not guarantee that you get funding, but there are some key roles that your board can play in planning competitive proposals.

More specifically, your board members can help in three ways. First, they can help clarify foundation funding priorities to see if your idea would be a good match with their interests. Second, they can help you gain information about the proposal review process: who will review your proposal, what is the level of reviewer's expertise, will the proposal be skim read or critically studied, and when will the review be done. Third, your board can help obtain post-review feedback: what did they like or not like about your proposal, if declined, is it worthwhile to revise and resubmit.

(Adapted from Grantsseeker Tips Newsletter, published by Miner and Associates, Inc.)