

CCEF LINK

California Consortium of Education Foundations

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

We would like to hear from our readers about what you like—and what you would change—about this or any other issue of CCEFLINK. Click [here](#) to send us your comments for publication in the next issue of CCEFLINK.

BACK TO SCHOOL

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

Back to School! These words are greeted with joy, anticipation and excitement. They can also induce a keen awareness that with this dawning of a “new year” there is much to be done and too little time to accomplish the long list of “to dos” and “priority one” items that each new year brings.

The list of “priority one” items this fall is especially awesome. The fiscal realities of each school district are the topic of newspaper articles and conversations in supermarket lines. We are all aware that lack of money does not make the needs of our schools less important. It just means that those resources need to be found. For many, the local education foundation has become one way that schools and districts can identify new resources.

And who offers you, the education foundation, the resources you need to do your job? The California Consortium of Education Foundations has taken on this role. We have many tools, opportunities and resources that are specifically tailored to the needs of education foundations:

- Conferences and regional meetings that can help with governing issues, fund raising, and program development
- Opportunities to network with other education foundations and learn what others are doing
- Avenues that can give you a voice on issues of importance to public education
- Tools for starting an education foundation and for increasing its effectiveness
- Recent articles about education foundations
- Providing information and resources to increase your success

For you to take full advantage of all that we have to offer, you should check out our web site at www.cceflink.org. CCEF can be most helpful to you if we know what you are up to as well. For a network to work, we need to have all

NEWSLETTER

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the information we can get about you, so you can be a resource to others. Finally, we hope you are planning on attending the conference in San Jose on November 6-7. The workshops and speakers are going to be terrific. Our mission is to be there as a resource to you, the local education foundations. We hope you take advantage of what we offer so your life and new year are easier.



ANNUAL CONFERENCE 2003 [\(TOP\)](#)

“Education Foundations: Their Changing Role in Today’s Economy”—This is the theme of the CCEF Annual Conference scheduled for November 6 and 7 in San Jose at the DoubleTree Hotel. Day II (November 7) will begin with the Idea Fair and the first set of concurrent workshops. Kevin Gordon, Executive Director of the California Association of School Business Officials (CASBO) will offer a **forecast of the budget and politics affecting education in the next year** in the morning general session. This will be followed by a panel of education foundation leaders sharing how their foundations are dealing with budget shortfalls.

After the second set of four concurrent workshops, attendees will meet for lunch, apple awards, and discussion tables. Chuck Supple from the Governor’s Office of Service and Volunteerism will offer the afternoon keynote —**“Improving Education Through Civic Engagement”** Chuck believes that in California today the untapped human resources of communities offer the best possibility for improving education. He will describe volunteer organizations and actions that are significantly benefiting the youth of individual communities and suggest how foundation leaders might similarly involve parents and other citizens as well as teachers and students.

The final workshop session entitled **“Birds of a Feather—Meeting with Peers”** will allow foundation leaders serving elementary schools/districts, high schools/districts and K-12 districts to participate in a facilitated discussion, sharing unique challenges and solutions. CCEF is also planning a session for everyone who attended the Education Foundation Fundamentals workshop in San Diego (Fall 2002) and in Sacramento and Pomona (Spring 2003). Attendees will have a chance to discuss the realities and successes they have faced in the last months.

Capacity Building Workshops on November 6

This year’s CCEF DAY 1 Workshops for leaders from established education foundations will focus on developing a major donor program and creating successful fundraising appeals.

In 2003 individuals in the US gave approximately \$200 billion dollars to charities! If you don’t have an individual major gifts program it’s time you considered starting one. Major gift solicitation is simply “The right person at the right time asking for the right amount for the right project” says Emily Hull-Parsons who will present on **“Major Donors – It’s All About Relationships”** from 8:45 a.m. to 12:00 a.m. on November 6. Emily has twenty five years of experience working with nonprofits and has chaired the Washington Union Education Foundation in Monterey County. This session is a MUST for foundations wanting to jumpstart a major gifts campaign.

In the afternoon, Mal Warwick, referred to as the “Guru of Direct Mail Fund-raising” will present **“Successful Fundraising Appeals”** from 100 to 400 p.m. He will work with attendees to develop effective direct appeal letters and share some of the cutting edge techniques used by marketing professions. Involved in the not-for-profit sector for four decades, he is the

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founder of four affiliated companies including Mal Warwick and Associates, a full-service direct mail firm. He has also written or edited sixteen books, including "How to Write Successful Fundraising Letters." Mal will share his expertise with local education foundation leaders, using examples supplied by participants to illustrate his Cardinal Rules of Creating Letters that Get Results! Attendees will learn how to create letters that get results.

"Grants That Work! Proven Formulas" from 4:00 p.m. to 6:00 p.m. on November 6 is designed for all foundation leaders wanting to develop a successful grant program. This workshop is designed for both foundation grant committees as well as teachers and administrators wanting to learn about innovate grants.

CCEF will also hold **"Education Foundation Fundamentals"** from 8:30 a.m. to 4:00 p.m. on November 6 for groups considering, starting, or revitalizing an education foundation. This all day workshop jump starts the establishment of an education foundation. Please visit the CCEF web site for more details at <http://www.cceflink.org/conference.htm>



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

The Apple Awards are the California Consortium of Education Foundations recognition of innovative, successful foundation projects and will be given on November 7. The focus for this year is, Meeting the Challenge. Special consideration is given to projects that involve collaboration and can be replicated. The Application deadline is October 24, 2003. See www.cceflink.org/apple.htm



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DESIGNING EFFECTIVE MEETINGS [\(TOP\)](#)

by Nice Alterman

Summer has come to a close and schools are back in session. This next year promises to be both exciting and challenging. Schools will be facing increasing financial pressure and education foundations will find themselves being asked to do more and more. To accomplish this it will be more important than ever to assure that your meetings are productive and effective. Too often people find themselves frustrated by meetings. Some common complaints are: agendas are not followed, issues never get resolved, people go off on tangents, and time is not used wisely.

Here are some tips for having effective meetings:

Establish group guidelines. This is a simple process in which everyone agrees to act in ways that will insure a smoothly run meeting. For example: one person speaks at a time, honor time limits, respect everyone's contribution, try to avoid side conversations, have fun. The group should adopt these guidelines at the start of their first meeting and refer to them if things get off track. This creates a common behavioral standard for everyone.

Create an agenda for each meeting. Preparing for meetings shows respect for everyone's time. The more conscious the preparation, the more productive the meeting. To prevent having an overcrowded agenda, do the following:

1. List all potential topics
2. Define the goal for each topic - information, discussion, action.
3. What can be handled before the meeting? What can wait until after the meeting?
4. Prioritize the list and put them in logical order

5. Write down a desired outcome for each topic
6. If quite a few agenda items need to be covered, assign time limits to each item

Send out agendas and any supporting information a week before the meeting. This allows people to come to meetings prepared. Don't waste meeting time on items such as informational reports that were included in the packet, unless someone has a specific question.

Nice Alterman of Nice Alterman & Associates is a Certified Professional Facilitator and has been a member of the Mendocino County Board of Education for the past fourteen years. She can be contacted at (707) 937-4540 or nice@mcn.org.

RESOURCE CENTER (TOP)

EDSOURCE: Since its inception in 1977, EdSource has served as an independent, nonpolitical, nonprofit dedicated to clarifying California's complex education issues. It is a major source of information on California's K-12 educational system. Many of EdSource's publications are downloadable for free from their website www.edsource.org and contain a wealth of information you can use to communicate the need for foundation support in your community. For instance, in How California Ranks, The state's expenditures for K-12 education, there is a great chart showing that California's education expenditure per pupil ranks next to the last among the ten most populous states. You can download this report at www.edsource.org/pub_abs_ranks03.cfm

"California's Commitment: Raising Academic Standards for All Students," EdSource's recently released 15 minute video serves as a parent education guide on California's standards-based reforms. Foundations might consider partnering with PTA's to sponsor a viewing of the film – in English or Spanish – followed by a community discussion.

EdSource is also a member of the Education-Data Partnership whose web site is a must visit for all local education foundation leaders, www.ed-data.k12.ca.us. This site contains fiscal, demographic, and performance data on all California public schools. There's state-wide data, county-wide, district-wide, and school level data. It also allows the comparison of schools within a district, and districts within a county.

To learn more about EdSource publications and services, visit their web site or call Susan Austin, Public Liaison Communications, at 650-857-9604.

EDVOICE: (www.EdVoice.org) is a non-partisan non-profit dedicated to improving education in California. Their free e-mail Action Alerts provide a way for the public to speak out to Sacramento on behalf of California's kids. Education advocacy through EdVoice is quick and effective, and it's a valuable way for LEFs to advocate on the issues that deeply affect them.

Take a closer look at what EdVoice is doing. They fought against harmful budget cuts to public education. They helped pass the largest school bond ever (\$13 billion of which was approved by voters in Nov. 2002), which has helped build new facilities. They implemented data systems that track student progress over time providing knowledge of which school programs work and which don't. And, they enacted meaningful teacher credentialing reform to attract more high-quality teachers.

Spread the word about EdVoice to your LEF! Include EdVoice in your next e-newsletter, send a message to your e-mail group, and link to www.EdVoice.org on your website.



... EdSource has broadened the public education policy topics it researches and has widened its audiences to include policymakers, researchers, K-12 and college educators, the media, parents, and the general public.

EdSource Online

For more information on EdVoice contact Sabrina Skinner, Director of Community Outreach at 650-595-5023 x130 or Sabrina@edvoice.net

Additional Resources

- National Center for Nonprofit Boards www.ncnb.org
- Board Café, a newsletter for members of nonprofit boards published by CompassPoint Nonprofit Services www.boardcafe.org
- Guidestar, a comprehensive source of grant information for grantseekers and grantmakers www.guidestar.org
- Facts and figures on philanthropic giving from the Center on Philanthropy at Indiana University and published by the American Association of Fundraising Counsel (AAFRC). www.givingusa.org
- The School Redesign Network, resources for small schools www.schoolredesign.net
- Resources for teachers at the San Francisco Education Fund www.sfedfund.org/links/index.html



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SANTA ANA CELEBRATION (TOP)

by Morgan Odell, DPA, CCEF Board of Directors

June 5, truly a night to remember, the night of the second annual Santa Ana Education Foundation (SAEF) Scholarships and Awards Gala, a crowd of 500 plus, half students, gathered at Century High School under the stars. But the big stars that night were the students. The dinner entertainment included a ballet folklorico group, Polynesian dancers, an orchestra, choir and display of a striking five-panel mural, the work of a Santa Ana High art class.

Co-emcees for the evening were Southern California Edison executive Dr. Jo Ellen Allen and State Senator Joe Dunn, respectively, a Republican and a Democrat whose light-hearted verbal sparring and platform skills produced a lively and interesting program.

This year's theme—Beating the Odds—was personified by three eighth graders: Emily Olvera told about overcoming leukemia; Russell Wells, who has successfully survived a shattered home life, spoke about his lofty goals, and Alan Castro, who needs two kidneys and sits through dialysis five times a week, explained why he remains positive about the future. The gripping stories of those brave students, related by videos and their own oral statements, brought tears from the listeners but also a strong feeling of hope for Santa Ana youth. On the spot several members of the audience stopped forward to establish scholarship funds for Russell and Alan.

Next came the parade of scholars, 67 students crossing the stage to receive a total of \$140,000 in college scholarships provided by the Change A Life Foundation and six other funders. Century High alum and UCLA sophomore, Nancy Sandoval, recipient of the \$10,000 a year, four-year Mi Abogado-Dastmalchi Scholarship, spoke on behalf the award winners.

Then taking the stage were 23 ABC (A Better Chance) program graduating 8th grade students, who, thanks to \$2.5 million provided by ABC and its participating schools, will be attending private preparatory schools across the country with a strong chance of winning admission to an Ivy League college upon graduation.

Earlier in the year SAEF had conducted a district-wide competition where 100 students submitted original pieces of art. Twenty-five were selected to be given to the Gala's corporate sponsors and the artists were on hand to



Student Juan Rivera delivering the keynote address



Student posing with State Senator Joe Dunn, United States Treasurer Rosario Marin, and Assembly member Todd Spitzer

make these presentations.

Along with students, parents, teachers and administrators the Gala brought together community leaders and corporate sponsors. Funding provided by lead sponsor Wells Fargo Bank and 14 other organizations more than covered all expenses including the dinner costs for students and parents.

Credit for the success of the event goes mainly to two people: insurance executive Sal Mendoza who three years ago took hold of a moribund foundation, envisioned a gala as a way of breathing new life into it and then signed up, Bernadette Madrano to make it happen, which she certainly did. She recruited and directed what turned out to be three very effective event committees, enlisted as Gala partners both scholarship providers and corporate funders and involved school personnel from across the District. The result, what was originally thought of as a fund raising event not only achieved that purpose but also become a celebration of the community's pride in its students and schools as well as in the ability of its citizens to work together in a common cause.

It was an inspiring night making young and old alike think, "Look what we have done, keep it up, we can do even better next year!"



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ARE LEF MEETINGS GOVERNED BY THE BROWN ACT?

By Ronald T. Vera, Esq. CCEF Advisory Board

The Brown Act generally requires the legislative body of a local public agency to hold its meetings open to members of the public. Agendas of the meetings must be posted and the public must be given an opportunity to address the legislative body on items of interest. The purpose of the Brown Act is to allow the public to attend, observe, monitor, and participate in the decision making process at the local level of government.

The question to be resolved is whether the meetings or activities of an education foundation, that has ties to a local school district, are subject to the requirements of the Brown Act. Depending on how the education foundation is formed, and how members of the foundation board are appointed, the Brown Act may apply. Because education foundations deal extensively with the public, there may be no easy answer. However, we hope the following analysis is helpful.

A "local agency," for purposes of the Brown Act, is defined in Government Code Section 54951 as follows:

"As used in this chapter, 'local agency' means a county, city, whether general law or chartered, city and county, town, school district, municipal corporation, district, political subdivision, or any board, commission or agency thereof, or other local public agency."

The term "legislative body" is defined in Government Code Section 54952 to include the board of private corporations in specified circumstances:

"As used in this chapter, 'legislative body' means:

. . . (c)(1) A board, commission, committee, or other multi member body that governs a private corporation or entity that either:

"(A) Is created by the elected legislative body in order to exercise authority that may lawfully be delegated by the elected governing body to a private corporation or entity.

"(B) Receives funds from a local agency and the membership of whose governing body includes a member of the legislative body of the local agency appointed to that governing body as a full voting member by the legislative body of the local agency . . ."

Under the language of Section 54952(c)(1)(A) the board of directors of an education foundation would constitute a “legislative body” subject to the Brown Act if the education foundation was: 1) created by the board of education of a school district to exercise authority lawfully delegated by the board of education or 2) the education foundation receives funds from the school district and the school district appoints one or more board members to the education foundation.

If either of these conditions are met, then the open meeting requirements of the Brown Act would apply to an education foundation. If not, then the Brown Act would not apply to an education foundation. In determining whether the Brown Act applies, education foundations should ask three questions: 1) Were you created by the board of education to exercise authority delegated by the school board? If the answer is yes, then the Brown Act applies. 2) Does the education foundation receive funds from the school district? If the answer is no, then the Brown Act does not apply. If the answer is yes, then consider the final question. 3) Does the school board appoint a member of its board to the foundation board? If yes, then the Brown Act does apply. However, if the education foundation – in the bylaws – calls for only a board member to sit on the education foundation board and appointment is done by the education foundation, then the Brown Act would not apply.

Since the requirements of the Brown Act are complex and who must comply is equally complex, we urge you to review these issues with legal counsel before you ultimately decide how to proceed.

Ronald T. Vera has worked with numerous education foundations and school districts throughout California. He is the author of the CCEF publication Education Foundations and Lobbying. Ron has been associated with CCEF since its inception in the early '80s. He has served on the board of directors and is currently on the CCEF Advisory Board. He can be contacted at the Law Offices of Gutierrez and Vera, 223 West Foothill Blvd., Second Floor, Claremont, CA 91711 (909) 624-2941, ronaldvera@netscape.net

MEET THE BOARD—LOIS SWANSON [\(TOP\)](#)

Since the very early days of CCEF, Lois Swanson has been the “program voice” of the organization. She has been an esteemed perennial presenter at the CCEF Annual Conference and other CCEF training meetings. Lois was actively involved in the planning and organization of CCEF and has served in various capacities on the Board of Directors since its inception in the early 1980s. She was also a founding member of the St. Helena Public Schools Foundation (SHPSF).

Lois' history of service to public education began when, as a graduate of Denison University she taught high school English in Cincinnati, Ohio from 1958-63. Her skills at organizing communities around projects to benefit their children resulted in a high school/nursery school partnership, a playground created from an alley for inner city nursery school children, A Better Chance Program to better prepare African American high school students for college, and a public swimming pool, among others.

In addition to her work with public education support groups, Lois has been a board member of the Women's Opportunity Fund (WOF) since 1994. An affiliate of Opportunity Fund International, WOF makes micro-loans to women in developing countries to encourage entrepreneurship and economic development. Her other activities include work with the Outreach Mission of her Methodist Church, a local book club (organized by Lois), and



Lois Swanson

the study of Spanish.

Lois and her husband Bill, sweethearts since high school, live in St. Helena, California; their four grown children and five grand children are a constant source of pride and delight.

FROM OUR READERS

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