



# 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.



## FOUNDATIONS AND PTAs—NATURAL PARTNERS

by Susan Sweeney, CCEF Executive Director

Local Education Foundations and PTAs throughout California are committed to supporting local schools and when they work together they can be a powerful force. This is the message Brenda Davis, California State PTA President and Susan Sweeney, CCEF Executive Director have been delivering over the last year to foundation and PTA leaders.

What is the secret to developing successful partnership? It is respect, cooperation, and communication. When local education foundation leaders were polled recently about successful relationships with their PTA, the importance of communication was paramount. In some districts PTA leaders at each school and the foundation meet regularly to discuss upcoming activities and fund raising plans. Through these meetings, each learns of the other's projects and activities and a master calendar can be developed to avoid conflicts. In Los Gatos this coordinating group is called the Resource Council. The Los Gatos Education Foundation ("LGEF") developed a way for the five Home and School Clubs and the LGEF to collaborate and generate funds for both groups by printing directories for each school with a uniform format and space for business advertising. For specifics on this project contact Beryl Grace, Vice-President Business Campaign of the Los Gatos Education Foundation. Walt Edwards, President of the Rincon Valley Education Foundation in Santa Rosa reported success with a similar directory project saving effort and increasing funds for the foundation and PTA.

To insure open communication many foundations have a liaison from the PTA attend monthly foundation meetings as well as appoint a foundation liaison to the PTA. Coordination is especially important if businesses and outside supporters are being approached. In some districts like Palos Verdes and Los Gatos, PTAs and foundations have developed clear guidelines as to the types of projects that each will undertake and they publicize these differences to parents and the community. "Each of our 15 PTAs has its own goals and they tend to fund things and "hard" materials such as playground balls, field trips, library materials. Our Education Foundation funds "For ALL kids at ALL schools" and our programs—such as the elementary school music program—must benefit every child in every school, says Andrea Sala, Executive Director of Palos Verdes Peninsula Education Foundation.

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CCEF

PO Box 19290

Stanford, CA 94309

650.324.1653 voice

650.326.7751 fax

[ccef@ccefink.org](mailto:ccef@ccefink.org)

### Executive Director

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Having both a PTA and Foundation at a school can create special challenges, but Cyndi Weingard, Co-President, of the Glenwood School Foundation in San Rafael reports that clear “charges” to each group and education of the community on the purpose of each has led to a harmonious relationship benefiting Glenwood students and faculty. Both groups work on capital needs such as the new Science and Art Center and work together on the annual school auction, splitting the proceeds.

Often foundations rely on PTA volunteers to assist with major events such as the Fun Run/Walk sponsored by EDUCATE! in San Diego. “Our local PTAs are beginning to understand that the more successful foundations are, the less they will have to fund raise and can focus on their mission,” reported Cheryl Creagh, President of EDUCATE! Tierra Bonito Education Foundation in Poway works with the PTA on a joint project each year. In 2003 the project was to place a new computer in each classroom. Joann Ruden of the Tustin Public School Foundation reports that her foundation allows their PTA/ PTO organizations to have a free booth selling food, games, school items at the annual Dinosaur Dash. Over 5,500 people attend the event; so the free booth and opportunity to raise funds benefits the PTAs and creates a good working relationship between the foundation and PTAs in the district.

Clearly mutual respect, communication with each other and the community, and cooperation are essential in building a successful relationship between foundations and PTA. And these successful partnership are a win-win for everyone —benefiting the children, the schools and the community. **Do you have a success story to share?** Please call the CCEF office on the toll free line 1-877-964-1500 or send an e-mail to [susan.sweeney@stanford.edu](mailto:susan.sweeney@stanford.edu) CCEF is continuing to collect these stories, and at the CCEF Conference on October 19, we will continue this discussion on Foundations and PTAs as Natural Partners.

## **PRESIDENTS CORNER—COMMUNICATION** by *Caroline Boitano*,

*President, CCEF Board of Directors* ([TOP](#))

How important is communication? What a silly question, you are probably asking yourself. Communication is essential. Good communication can create harmony and bad communication chaos. But what does all this mean for your education foundation?

### **Telling your story**

Every letter, newsletter, email, or brochure should be an opportunity to tell your story, and while this sounds simple enough, it requires thought and planning. And remember – there is often more than one story. Your story can begin with something as uncomplicated as using a consistent tag line.

CCEF—Linking Schools and communities is our tag line. It tells people that our job is to help you be the link to the larger community. You may want to highlight short stories of successful grants. You may want to talk about a larger grant that has made a big difference to a classroom or a school. These individual stories are all part of your story. You don’t need to use them all at once. But you do need to plan so that everyone understands your organization, what it does, and why it is important to them.

### **Plan**

We are really talking about developing a comprehensive plan for communications. This does not need to be an expensive or complicated process if you don’t have those resources. Of course an expert can give you very good advice on how to proceed. Put simply, your board needs to answer some very basic questions, and develop tools that can be used in any or all of the communications you develop.

### **What message do you want people to have?**

Look at your mission statement. Does this tell people who you are and what you are trying to accomplish? My one warning here is that many foundations see their mission as “raising money.” “We raise money” is not the message

Mary Leslie  
*Consultant*

Michael Pinto, Ph.D.  
*Laguna Beach Ed Endowment & Capital Fund*

Charla Rolland, Ed.D.  
*Stanford University*

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Ronald T. Vera, Esq.  
*Law Offices of Gutierrez & Vera*

Robert Wood, Esq.  
*Lafayette Arts & Science Foundation*

### **Newsletter Editor/Designer**

Robin Gladstone  
[webmaster@ccefink.org](mailto:webmaster@ccefink.org)



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that will help you here. It's what the money can do that will convince people to invest in your work.

### **Do you have a series of success stories that can be used interchangeably?**

If you are new, then start pulling together your stories. What did the grant to bring the poet to the classroom accomplish? How many students helped with the outdoor garden? Each grant should have a brief paragraph that you can use as examples as you write to parents and community members.

### **How often and for what reason do you communicate?**

As you plan each year, you should know when the newsletter goes to parents, when you invite people to the fund raiser, when you solicit individual gifts. Seems simple, but many foundations let the individuals in charge of each activity set the schedule for that activity. It is important that you plan your communications well in advance. Planning becomes your coordinating tool that helps your organization stay on top of all its activities.

### **Implementation**

Its good to have a plan, to know your message, and now you need to implement the plan. This means assigning the work of communications to a board committee. Bring outsiders onto the committee as well. It's a great board recruitment tool, but more importantly, it brings fresh ideas to important work. If you are a small foundation, this work can be part of the program committee.

You want people to know who you are, what you do, and why you are important. This means a consistent message, a clean look if you have a logo, that does not distract from the organization's message, and a clear understanding that if you are coordinated in your communications, you will reap the benefits in better relationships and greater success in your work.



## **2004 ANNUAL CONFERENCE [\(TOP\)](#)**



2003 Conference

Mark your calendar and plan to join other foundation and education leaders for two intensive days of training and networking at the CCEF Annual Conference, "Raising the Bar: Foundations Meeting the Challenge," Hilton Costa Mesa in Orange County, October 18-19, 2004. This is your once a year opportunity to network with other LEF leaders and, gain a statewide perspective and focus on the skills that are needed to make your foundation successful in today's challenging economic climate.

**DAY ONE (October 18)** there will be two all day tracks plus a late afternoon seminar focusing on how to develop a successful classroom grant program.

**Track I – Education Foundation Fundamentals**, an all day workshop for groups in the process of starting or revitalizing their organization.

**Track II** – morning and afternoon in-depth workshops to sharpen the skills of established education foundation leaders. The morning workshop will focus on "**Transitioning to a Foundation with Staff**" In the afternoon, we will have a workshop on "**Major Donors, Developing Relationships**"

**Track III "Grants that Work, A Formula for Successful Classroom Grants"** a late afternoon workshop for foundation leaders and teachers on developing a successful foundation grant program.

**DAY TWO (October 19)** there will be statewide policy and education updates, a briefing on the new financial and legal issues that affect the work of your



The CCEF Apple

Awards have been revised. In 2004 there will be three awards –one in each of the following categories 1) Apple Award for Publications / Communications 2) Apple Award for Programs and Outreach 3) James Howard Apple Award for Fund Development. Go to [www.cceflink.org/apple.htm](http://www.cceflink.org/apple.htm) for more details.

foundation, 10 skill building workshops, luncheon discussions, an idea fair with take-home samples, Apple Awards and informal networking.

At the end of the day we will again have the popular facilitated discussions with peers statewide. It has been suggested that budget might be an indicator of the issues internal and external that foundations are dealing with so foundation leaders will be in groups with others at a similar budget level.

Tentative workshop sessions are:

1. Foundations and PTAs Natural Partners – Recipes for Success
2. Building and Retaining a Successful Board
3. Reaching out to Corporations and Businesses
4. LEF Programs that are Making a Difference
5. Successful LEF Fund Development Programs
6. Developing an Effective Web Site
7. Strategic Planning
8. Successful Fundraising Appeals
9. Building Community Support
10. Advanced Fundraising –Planned Giving & Endowments

Please send CCEF an e-mail to tell us by number which workshops are of special interest to your LEF. The CCEF Program Committee would like your input. Mail your preferences to [ccef@ccefink.org](mailto:ccef@ccefink.org) or visit our "easy to fill out" online survey [here](#).

We also welcome input on informal luncheon discussion topics.

Overnight Accommodations: Conference and Workshops are at the Hilton Costa Mesa, located at 3050 Bristol Street, Costa Mesa. Call 714-540-7000 and identify yourself as a CCEF conference attendee for special room rate -- \$109 single/double plus tax. Reservations must be made by September 15. Parking all day for \$6. Complimentary shuttle from the John Wayne Airport. Visit [www.ccefink.org](http://www.ccefink.org) for details and updates. A conference brochure will be mailed at the end of August.



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## **LAFAYETTE ARTS AND SCIENCE FOUNDATION (LASF) [\(TOP\)](#)**

*by Richard Whitmore*

LASF began in 1980/1981, in response to the first downturn in education funding in the post-Proposition 13 era of California budgets. It was the beginning of a cycle of ups and downs in public education, with the decline in funding replayed in the early 1990s and again over the past three years, as school systems suffered mid-year cuts for the first time ever.

From the beginning, the goal of the foundation was to create and deliver its own programs, thereby ensuring that the community's priorities for its students were reflected in the classroom activities of the children. Arts, both visual and performing, and science, in particular a rich hands-on experience, were the first priorities of the organization.

The LASF mission, recently reaffirmed by its Board, is to support and enrich the education of every child in the Lafayette public schools through a broad-community based effort. That effort includes not just fund-raising for the schools, but tapping parent and community expertise to ensure each educational experience that LASF delivers is brought to the classroom by a highly qualified and experienced instructor.

LASF's development of its own curriculum and programs distinguishes it from many other educational foundations. In addition to having our own instructors deliver our programs to our students, we are also distinctive in serving two different school districts with a total enrollment of 4500 students: the Acalanes Union High School District and the K-8 Lafayette School District. The instructors are drawn from the community--artists, musicians, scientists--and are compensated. They meet with the district teachers to assure that the



Kindergarten students studying Native American culture



material they present is integrated with and supplements the regular course work.

Today, the foundation provides enrichment activities across the core curricula, including support for writing through a one-on-one tutoring program called Writing For Mastery, and in social studies with hands-on projects intended to take our students back in time - in fourth grade to experience the gold rush, in sixth grade to make their own sarcophagi. We have continued our commitment to arts and science with a choral music program that regularly touches every student through grade 5, by supporting drama and instrumental music, by providing a comprehensive visual arts curriculum, and by expanding and refining our science program so that it is aligned with state science standards and continues to deliver unique hands-on experiences to each student.

Maintaining these programs has been difficult as increasing constraints on state funding impose ever-heavier burdens on our school districts. But we have effectively collaborated with the two districts to make sure we are supporting their needs as well as our programs, and have provided additional support to the high school district for elective sections and to the elementary district for class size reduction in 8th grade English as well as supplies and books to keep science and reading programs thriving in our schools.

To support these activities LASF last year raised over \$800,000. Two-thirds of this amount came from parents, the rest from business and community contributions, scrip, matching funds, the United Way and LASF's one annual event. Some 110 instructors served in classrooms along with some 100 volunteers.

Many of our donors are also our volunteers - not just at our fundraising events, but at the art and science fairs we support at each school, or on our curriculum development committees, and some head straight to the classroom to deliver instruction, like Mary McCosker, a former school board member and LASF board member who teaches every third grader the history of Lafayette. Another volunteer is Robert Wood, a long-time member of the California Consortium of Education Foundations board and a founding member of LASF, who still serves as its attorney.

*Richard Whitmore is president of the Lafayette Arts and Science Foundation and also a member of the Acalanes High School District board of trustees. Professionally, he is Chief Financial Officer of WestEd, the educational research and development organization whose 17 offices work with school districts throughout the West. Previously he served as Chief Deputy Superintendent of the California Department of Education. LASF can be contacted at [office@lasf.org](mailto:office@lasf.org)*

### **MEET THE BOARD—MUHAMMED CHAUDHRY [\(TOP\)](#)**

Muhammed had this to say when he joined the board of CCEF in 2004. "Local education foundations are necessary to support the success of our youth and further leverage the education establishment. Whether it is to supplement the cost of education or to provide support services for youth to be successful inside the classroom, there can be many ways of securing our children's future. CCEF allows for a Center of Expertise that Foundations can access. This is critical to avoiding pitfalls along the way and achieving the foundation's mission."

Muhammed Chaudhry is the Executive Director of The Franklin McKinley Education Foundation. Prior to serving in his current capacity for FMEF, he was a Marketing Manager with Dazzle Multimedia and The Clorox Company. Muhammed serves as the national Vice President of MKA USA, Board member of the San Jose Arena Authority, Hispanic Foundation Silicon Valley and the Galarza Institute. His personal interests include golf and long distance running. Muhammed holds a Bachelor of Science degree in Business Administration from San Jose State University.



Muhammed Chaudhry

"I grew up in San Jose, and like other immigrant families to Santa Clara County, I appreciated at an early age, the great cultural diversity of our community. Having attended local public schools, I also gained an appreciation for the power of education on the lives of youth, adults, and our neighborhoods."



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## IN THE NEWS [\(TOP\)](#)

### Education Foundation Fundamentals

During May 2004, CCEF provided training for groups wanting to start or revive a local education foundation. A grant from **Bank of America Foundation** enabled CCEF to provide workshops in both Pomona and Sacramento in response to requests. Entitled *Education Foundation Fundamentals* the intensive one-day training focused on the legal, financial, and political aspects of creating a foundation as well as offered information on organizational development, friend and fund-raising techniques, and successful program development. Presenters offered a wide range of experiences and perspectives on what it takes to create a successful education foundation. "Keep the needs of the children first. Let this guide your decisions," Lois Swanson, CCEF Board member and a founding member of the St. Helena Public Schools Foundation, told attendees. For the second year, Jostens provided partial scholarships for high school organizations interested in Renaissance, a specific form of education foundation. As part of the day, CCEF has developed a special resource binder available to all workshop participants.

The next Education Foundation Fundamentals Workshop will be held in Costa Mesa on Monday, October 18. Contact CCEF for details and to be on the mailing list.

## FROM OUR READERS

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Terri Montgomery, Vavrinek, Trine, Day & Co., LLP, and Caroline Boitano CCEF President



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CCEF  
PO Box 19290  
Stanford, CA 94309

650.324.1653 voice  
650.326.7751 fax  
[ccef@cceflink.org](mailto:ccef@cceflink.org)



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