

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.



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LOCAL EDUCATION FOUNDATIONS AND THE SCHOOL DISTRICT SUPERINTENDENT

by **Wayne Padover Ph.D.** Assistant Professor,
National University, Los Angeles

The keyword in the real estate industry is the often repeated term "location, location, location". In matters of local education foundations, it seems the keyword is "relationship, relationship, relationship". As a former California school district superintendent for twenty years working in three school districts (urban, suburban and rural) I have seen the importance of relationship-building relative to school district superintendents and local education foundations. I will discuss three recommendations Local Education Foundations (LEFs) can utilize to ensure they establish or maintain a sound relationship with their school district's superintendent.

The first suggestion is to establish the relationship at the outset of the superintendent's tenure in the district. This can be done by having LEF membership's active participation during the interview stage of the hiring process. If an LEF member can not participate on one of the interview committees, perhaps an interview question could be submitted addressing the candidate's experience and interest in working in a collaborative process with an LEF. This action serves two main purposes. Initially, it communicates a clear point of view of the Board's and community's expectation for a successful candidate. Secondly, it reminds the Board of the skills and experience that are valued by the LEF membership as they view superintendent candidates.

If your foundation is in the early stages of formation, make sure to contact the superintendent so she/he understands the general goals and mission of the organization. Assure the superintendent, although you are an independent entity, your intent is to work in concert with her/him and the school district for the benefit of the students.

This communication should occur very early in the LEF's formation

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process to forestall inaccurate information being disseminated to district personnel. Whether the LEF is newly formed or very mature, maintain an ongoing visibility at school board meetings. This may occur by providing brief reports of the LEF's activities from time to time. It can also occur by the sheer presence of LEF membership. The superintendent will notice. She/He will also likely be pleased and impressed the LEF is providing an opportunity to better understand the issues facing the district and the challenging role played by the superintendent.

Finally, I have not often seen successful LEFs that did not enjoy a sound working relationship with the district superintendent. As in any relationship, there are the proverbial "ups and downs" and yet people of good will choose to bring about successful conclusions for the students they serve.



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

"Raising the Bar: Foundations Meeting the Challenge," the 2004 CCEF Annual Conference scheduled for October 18-19 at the Hilton in Costa Mesa is a great way to gain important skills to make your foundation even more effective and to learn what other foundations in California and beyond are doing.

Day 1 (October 18) features three intensive training tracks: Education Foundation Fundamentals is for community and educational leaders seeking to begin or revitalize their local education foundations. A capacity building track is scheduled for established education foundation leaders followed by a session on classroom grants.

Day 2 (October 19) will feature four sessions with sixteen concurrent workshops to choose from, scheduled around a morning general session focusing on legal and financial issues for local education foundations and a luncheon keynote speech by Ted Mitchell, President of Occidental College.

Contact CCEF for a conference brochure or download one from the CCEF website at www.cceflink.org.

The informal lunch discussions will again be sponsored by **Harris Graduate Connection** and will provide foundation leaders an opportunity to talk with others having similar interests.

New this year-CCEF will offer a limited number of mini consultations to member LEFs. Contact CCEF if you are interested.

Remember to bring newsletters, brochures, left-over fund appeal letters to share at the Idea Fair. Let CCEF know about organizations that would be appropriate exhibitors at the Idea Fair

Apply for an Apple Award

During lunch the 2004 Apple Awards will be presented. There are three categories:

- Publications and Communications
- Programs and Outreach
- James Howard Award for Fund Development

(This last award is named after longtime board member Dr. James Howard who often worked with foundations on fund development.)
www.cceflink.org/apple.htm for more details and to download the nomination form.

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THE YEAR PAST [\(TOP\)](#)

*by Caroline Boitano, President and
Susan Sweeney, Executive Director*

Our "New Year" has begun, and we wanted to report to you, our members, the highlights from last year.

Our trainings and networking opportunities were the strongest we have offered to date. The Annual Conference last fall was the highlight of the year, with the best attendance, the most enthusiastic participants, and overall the best reviews of any conference in recent memory. Some of this was because of the outstanding presentations, but it was also the result of your willingness to share with each other during the two day conference. Those who attended both days were particularly happy with the time they spent. It's clear that the recent crisis in funding is driving the need, but your enthusiasm comes from your vision for education. We hope you are planning to join us for "Raising the Bar: Education Foundations Meeting the Challenge," scheduled for October 18-19 in Costa Mesa.

Trainings and regional gatherings in Sacramento, Ontario, Orange County and San Diego were all well attended. You again felt the need to investigate whether a foundation should be established, or you were looking to revitalize your LEF. In both cases you built new networks with others and gained some new skills. In addition we revised the "Fundamentals" course and can now offer a CD with templates that make it easier for new foundations to "get organized!"

The CCEF Web site has become more dynamic and has more information than ever before. We are pleased that the content serves our members, gives good information, and connects you with other resources. We know more and more people are looking to CCEF through the web site. Please continue to give us your feedback, ask questions, and tell us when you see something which should be added to the web site.

And we are reaching out as an organization as well. We are proud that the Newsletter has taken off with regular editions and we hope that you are sharing it with others. In addition we are reaching out with presentations to the National School Boards Association, the Association of Small School Districts (about half of all districts in California), and a meeting of foundation leaders in Florida. Susan will also be speaking in New York later this year.

There is a project with the PTA in California to encourage cooperative ventures between LEFs and PTAs in California; and CCEF was part of a meeting of after school programs.

And all of this has happened while we have been strengthening our own organization. CCEF has new board members, a revised mission statement that includes a commitment to advocacy on behalf of education, and a commitment to broaden our dialogues with any organization where we see a common concern for the education of California's children.

We are looking forward to the current year with high expectations and a vision that each district in California will see that a Local Education Foundation can be the key to linking strong schools to local communities.



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TAKING FUNDRAISING TO THE NEXT LEVEL

*by Emily Hull-Parsons, Creative Solutions!
Consulting for Nonprofits [\(TOP\)](#)*

Let's do a quick review of where your education foundation is raising its money. I imagine you have a special event, perhaps a -THON or two, some foundation grants, and some contributions from local businesses. I'm hoping that you have an annual appeal of some sort to the parents in your district. Does that about sum it up?

Go one step further. Are the individual donors that give to your foundation mostly parents? Do they give about the same size gift each year? Do they stop giving when their kids leave the district? If the answer to most of those is yes, I propose that is probably true because that is what your board has expected and accepted.

Let's look at a few facts about philanthropy. The number of individuals with wealth or disposable income in the US is growing faster than the number of corporations and foundations. Individual gifts and bequests total 84% of all giving in the US in 2003, at's about \$202 BILLION!

If your foundation does not have a major gifts program in place, it's time to take your fundraising to the next level.

What can it do for your organization?

- Enable you to raise more money than ever before
- Diversify your funding streams
- Decrease dependence on grants and special events
- Acquire loyal donors that give year after year
- Upgrade donors from smaller to larger gifts
- Stabilize income received from individual donors
- Secure funding in the most cost effective way
- Identify future board members and volunteer leaders
- Establish the foundation for a future endowment or capital campaign

Remember, when it comes to raising money, the economy is not the problem. Not asking enough people for gifts is the real problem!

Emily Hull-Parsons will be presenting the workshop "Major Donors - It's All About Relationships" at the CCEF annual conference in October 2004.



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USING SOCIAL NETWORKS TO SUPPORT SCHOOL FOUNDATIONS [\(TOP\)](#)

by June A. Flora and Carol Fields, Menlo Park-Atherton Education Foundation

After two decades of fundraising and awareness building, only 40 percent of Menlo Park City School District (MPCSD) families contributed to the Menlo Park-Atherton Education Foundation (MPAEF) each year. This number was a glaring contrast to the over 90 percent participation in the PTAs at our four schools. Yet, the MPAEF provided approximately 6 percent of the funding for our K-8 public school district, a funding source that is vital to our children's education.

To confront this conundrum, MPAEF Board members analyzed the MPAEF communication strategies. This examination of messages, programs, promotions, and message placement highlighted several

issues: MPAEF messages and programs were often remote and somewhat abstract (e.g. incoming kindergarten parents found it difficult to understand needs of middle schools), focusing on district-wide issues. School PTA's, on the other hand, provided real-time concrete communications to parents in the classroom and at each school. Further, many communication strategies of PTA's were interpersonal. With this information in hand, the MPAEF Board embarked on a new initiative to enhance our relationships with parents by building a social network communications program, called Foundation Ambassadors. Our short-term objectives were to build a community of informed volunteers who could speak about the MPAEF and its programs. Our longer-term objectives were to increase parent participation in our donation programs and to enhance donation level.

Beginning in the spring of 2003, we recruited a team of 125 parent volunteers who could serve as the social opinion leaders (social science research indicates that these are individuals who are respected and whose opinions are sought after). Called Foundation Ambassadors, these new MPAEF Information leaders operated in a ratio of one Ambassador for every 20 to 25 families. Second, Ambassadors participated in a one and a half hour training regarding MPAEF and its programs and their participation in those programs. In addition, a strategic print- and web-based communications program that reinforced their interpersonal efforts and informed the community at large about their efforts supported them. Third, to support Ambassadors' efforts in enhancing participation from all sectors of our parent community, we re-examined our fundraising programs and tailored our messages and tactics to match the financial capabilities and economic constraints of different segments of our community. By tailoring programs we encouraged all families to participate in MPAEF programs. An example of a specific lower-cost program was our "Be-My-Valentine" program that allowed families to honor a favorite teacher with a donation of as little as \$10.00.

By the spring of 2004, family participation in the Foundation grew significantly, helping raise participation to approximately 60 percent overall. Total dollars contributed by families during this direct solicitation campaign grew by over 60 percent compared to one year ago (Foundation Ambassadors were directly engaged in the direct solicitation program and indirectly in other programs). In addition, we saw that the increased outreach by Ambassadors accelerated contributions by families new to the District as measured by an incremental increase in participation by more than 100 new families.

As evidence of the further reach of this new social network, Foundation Ambassadors were a visible resource to parents in the fall of 2003 when the community voted on two new parcel taxes designed to raise funds and restore 50 percent of the funding lost to state budget cuts. At that time, Ambassadors were fulfilling their role by communicating the value of quality education in our community. An overwhelming majority of voters passed both parcel taxes at the ballots on November 4, 2003.

The MPAEF Foundation Ambassador program modeled how systemic outreach and education can build a social norm of financially supporting our schools by giving to our Foundation. Success was built also upon the careful and planned staging, assessment and

learning from a pilot program in 2002. Second, based upon findings from the successful pilot, we strategically cultivated volunteers. Third, we produced a set of tactics, communications, programs, and events that resonated with all sectors of the community and supported our Ambassadors in the classrooms. Fourth, understanding the inherent implications of social networks and opinion leadership, we created opportunities for our community to interact socially to celebrate their goal of providing an excellent education for all children in the Menlo Park City School District. Finally, our message of the need to support our children and our schools is a message that is inherently social and can rapidly diffuse. We noted, however, that the framing and content of the message for financial support is critical; diffusion can slow or be interrupted if messages are not carefully crafted with input from the community (such as formative research). In an optimal environment, this message diffusion in turn helps create a social norm for support. This norm for supporting public schools financially in turn supports an active social network program. Thus, a reciprocal cycle of support is generated, which over time can grow in size and strength of commitment



MEET THE BOARD - RON VERA [\(TOP\)](#)

Ron Vera is returning to the CCEF Board. His history with CCEF has been a long and rich one. Ron was the attorney who helped CCEF file for its non profit status in the 1980s and has served on the board in the past. "School foundations are becoming more important to both schools and districts" he declared. Ron has assisted in the formation of many foundations in California. His law practice has an emphasis in education, land use and environmental issues. He authored a white paper on Local Education Foundations and Lobbying available to CCEF members and has presented at many of our conferences.

Ron Vera is an attorney and partner with the law firm Gutierrez & Vera, LLP. For seven years he was adjunct professor of law at Loyola-Marymount University School of Law in Los Angeles, where he taught education law. Ron was also visiting Professor of Law at Loyola Law School. He received his law degree from UCLA and his B.S. from Michigan State University.

"In 1992 I took a year off from the practice of law and spent the year as a visiting professor at Loyola Law School where I taught, among other courses, Education and Law. In preparing for teaching, I researched how public education grew from a mishmash of efforts to a collective system that was used to bind together the various immigrants who were coming into this country at the turn of the 20th century. My father's father came to this country as a young man who had barely a second grade education. It was public education that enabled my father to get a footing in this society and also provided me with the opportunities that I now enjoy. It is for this reason, I understand the vital role that CCEF plays in supporting public education in California and throughout the United States.'



Ron Vera



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

National Neighborhood Day is a new non-profit initiative that encourages people to gather in their neighborhoods on the second Sunday in September. This year National Neighborhood Day is on

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September 12th. It's fun and it's easy! Visit www.neighborhoodday.org for ideas, inspiration, information, and assistance for organizing neighborhood gatherings. See how easy it is to plan and host an event with the tools and templates available on the site!

Correction Brenda Davis, who was mentioned in the Foundations and PTAs story in the last issue of CCEFLINK, is California State PTA President Elect. She will become President in June 2005. The current California State PTA President is Carla Nino.

Orange County Conference CCEF Members Sylvia Garrett, HBHSD Educational Enrichment Foundation, Morgan Odell, Santa Ana Education Foundation and CCEF Board, Michael Pinto, Laguna Beach Educational Endowment and Capital Fund and CCEF Advisory Board, and Bernedette Medrano, Executive Director of the Santa Ana Education Foundation, all spoke at the June 2004 conference organized annually by the Orange County Coalition for Public Schools Foundations (OCCPSF)

FROM OUR READERS

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CCEF members speak at Orange County Coalition for Public Schools Foundations (OCCPSF) Conference

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