



# **The Eureka Schools Foundation Strategic Plan 2015-2017**

**Operating Committee Planning May-November 2014**  
**Board Review and Input 25 January 2015**  
**Full Plan Integration prepared May 2015**  
**Board Adoption Proposed: 27 May 2015**

# The Eureka Schools Foundation Strategic Plan

## Table of Contents

<b>Topic Area</b>	<b>Page Number</b>
<b>Introduction &amp; Overview</b>	
• Problem Statement	3
• ESF Strengths & Opportunities	3
• Strategic Planning Process	3
<b>Strategic Plan Overview</b>	
• Mission	4
• Vision	4
• Values	4
• Revenue Goals	4
• Revenue Goals Rationale	5
• EUSD Support-Enrichment / LCAP	5
• ESF Goals – Summary	5
<b>Goals, Objectives &amp; Deliverables</b>	
• Goal 1: Operations	6
• Goal 2: Volunteer Organization of Choice	7
• Goal 3: Growth	8
• Goal 4: Effective Communication	9
<b>Exhibits to Strategic Plan</b>	
• Exhibit 1: Revenue Goals Spreadsheet	10
• Exhibit 2: Board Roster and Terms	
• Exhibit 3: Annual Budget	
• Exhibit 4: Annual Master Calendar	

---

## Introduction & Overview

The Board of Directors determined there is a need to make the work of ESF more scalable and systematic to better serve the enrichment needs of students and families within the EUSD.

### Problem Statement

Eureka Schools Foundation (ESF) desires greater awareness and a more compelling message among stakeholder groups\* that results in more funds raised and distributed to Eureka Union School District (EUSD) with:

- Clear and concise plan embraced by members at all levels of ESF
- Scalable, sustainable infrastructure of operations
- Greater stakeholder involvement

\* Stakeholder groups are defined as parents, sponsors, alumni, and community members.

### ESF Strengths and Opportunities

Stakeholders and ESF Board members were surveyed about the strengths and opportunities of the organization. We learned:

Strengths	Opportunities
<ul style="list-style-type: none"> <li>• 20+ years in existence.</li> <li>• Financial performance, including more than \$7 million raised and strong, transparent track record.</li> <li>• Helping our schools to help our kids.</li> <li>• Great partnership with administration, teachers, parents within the EUSD.</li> <li>• Tremendous dedication by volunteers.</li> <li>• ESF attracts motivated, talented leaders.</li> <li>• Continuity year-to-year through tribal knowledge.</li> <li>• Well-run events serve as a “community hub”.</li> </ul>	<ul style="list-style-type: none"> <li>• The ESF “engine” has grown tremendously and requires “more”.</li> <li>• Sentiment that funds raised (annually and endowment) could and possibly should be higher from parents, sponsors, alumni, and the community-at-large.</li> <li>• Recruitment, development, and transition of to board/leadership positions is not robust</li> <li>• Need greater involvement by more stakeholders, including parent representation in all schools.</li> <li>• ESF could be the “preferred” volunteer organization in our community.</li> <li>• Need more formal infrastructure to ensure best practices from all-volunteer leadership.</li> <li>• Existing assets may not be designed to maximize their fundraising potential, including our marketing vehicles and events.</li> </ul>

### Strategic Planning Process

The ESF Board approved the development of an ESF Strategic Plan in the spring of 2014. A core team of board members, along with a paid consultant, met regularly from May through November 2014. The committee process concluded upon presentation of the draft plan at the 3 December 2014 Operating Committee meeting. Following a review period for the Operating Committee, this plan was presented to the full Board of ESF in January 2015, finalized thereafter, and will be presented for approval at the 27 May 2015 meeting of the Board.

---

<b>Strategic Plan Overview</b>
--------------------------------

**ESF Mission**

To engage our community's businesses, parents and partners in support of the Eureka Union School District to enhance the academic achievement of all students through enrichment programs.

**ESF Vision**

The Eureka Union School District will be recognized for its excellent public schools for all children and serve as an anchor to a robust and involved community.

**ESF Values****Commitment to Volunteerism**

We value, respect and appreciate people's talents, energy and time in service to the betterment of our schools.

**Commitment to Being Community-Minded**

We create a sense of partnership among our student body, administration, faculty, board members, volunteers and sponsors.

**Commitment to Excellence**

We pursue excellence in everything we do and use measurement-driven approaches to enhance our performance and ensure accountability.

**Commitment to Innovation**

We seek out opportunities to enhance the quality of the Eureka Union School District (EUSD) student and teacher education through supplemental enrichment offerings.

**Commitment to Integrity**

We operate in an efficient, effective, transparent environment and are committed to always doing the right thing on behalf of the students of EUSD. We do this, in part, by complying with all local, state and federal laws applicable to a nonprofit organization, and we adhere to established governance procedures.

**Revenue Goals**

By the end of school year 2017/2018, we seek to attain \$1 million in annual net revenue and grow the endowment to exceed \$1 million. We will pursue these financial goals by connecting the resources of businesses, partners, parents and the community-at-large.

	<b>2013/2014</b>	<b>2014/2015</b>	<b>2015/2016</b>	<b>2016/2017</b>
Events	\$289,506	\$314,506	\$334,506	\$354,506
Annual Giving	\$190,000	\$294,750	\$381,375	\$427,500
Sponsorships	\$113,694	\$136,433	\$163,719	\$196,463
Endowment	\$40,000	\$40,000	\$40,000	\$40,000
<b>Total:</b>	<b>\$633,200</b>	<b>\$785,689</b>	<b>\$919,600</b>	<b>\$1,018,469</b>
% Increase per year:		24%	17%	11%

### Revenue Goals Rationale

Events: a \$65,000 net revenue growth in events is due to:

- Reduced Golf expenses (\$25,000).
- Online auction growth (\$40,000).

Annual Giving Campaign (AGC) growth is driven by:

- Increasing the average gift from \$283 to \$300.
- Increasing district family participation from 28% to 50%.
- Participation in the Big Day of Giving online fundraising event (and its partial match).
- Increased donations from the community-at-large.

Sponsorship growth is factored at 20% per year.

### Eureka Union School District (EUSD) Support – Enrichment / LCAP

Why does ESF need to raise \$1 million annually? Over the past 23 years, ESF has helped innovate, develop and maintain many of our district's educational enrichment programs – opportunities other districts do not have. Such enrichment serves both students and teachers. In 2014, EUSD approved a 3-year local control and accountability plan (LCAP), designed to tailor local school spending to the local needs of our students. ESF has committed itself to be a principle stakeholder in supporting the enrichment programs within the LCAP. Between ESF's ongoing innovation and maintenance of select enrichment programs and pledged funding of the LCAP, ESF has assumed an even greater role in our children's education. ESF is the largest supporter of EUSD – over \$650,000 annually. Enrichment programs will include:

- Summer Institute – teacher training
- iCode
- World Language program
- 21<sup>st</sup> Century classroom technology
- Music instruction and equipment
- Athletics
- Library resources
- Art
- Other programs to be identified

### ESF Goals – Summary

Goal	Purpose
<b>1. Operations</b>	Create an effective organization that supports board management, volunteer efforts and EUSD.
<b>2. Volunteer Organization of Choice</b>	Attract, develop and retain the best volunteer staff.
<b>3. Growth</b>	Grow ESF's revenue opportunities throughout our community.
<b>4. Effective Communication</b>	Share ESF's high quality, value and contributions with our community partners.

<b>Goals, Objectives and Deliverables</b>
---

**Goal 1: OPERATIONS – Create an effective organization that supports board management, volunteer efforts and EUSD.**

Rationale: To achieve our goals, we need to focus on activities that deliver the highest returns on investment of time and money. It is equally important that we operate efficiently, effectively and transparently at all times.

To create and manage an effective organization, we will:

**1.1:** Develop an **internal communications strategy and meeting schedule** to ensure that the Board and its committees are coordinated and have the resources to effectively advance the mission of ESF.

Community Engagement Committee:

- a) Invest in a web-based repository for all Board and event documents and schedule an annual audit of the repository to ensure timely archiving.
- b) Develop a strong case for volunteer engagement, followed in the second year by a comprehensive volunteer database.

Governance Committee:

- c) Master Governance Calendar that includes all events, committee milestones, and critical due dates.
- d) New Board member orientation, biannual board training discussions at Board meetings, and an annual planning retreat.

**1.2:** Establish and maintain a **records-keeping system** that supports the nimble nature of our organization without compromising professional treatment of and access to records. **This includes establishment of protocols for:**

Community Engagement Committee:

- a) A donor and sponsor database
- b) EUSD information necessary to support ESF activities at each school site.
- c) Coordinate records system access with official website.

Finance Committee:

- d) Budgets, reports, operations binder for all activities.

Governance Committee:

- e) Board and committee rosters, job descriptions, evaluations, training.

**1.3:** Ensure we have **operational and strategic plans** to guide our success, balancing our plans with the capabilities and capacities of the organization. Ongoing considerations include:

Community Engagement Committee:

- a) Link our communications strategies to revenue goals.
-

Finance Committee:

- b) Consider outsourcing critical responsibilities (e.g., social media, webmaster, marketing, organizational management support) while maintaining operational expenses at less than 10-12% (or within industry standard) of overall budget.
- c) Determine what amount of money and/or in-kind resources we seek per target audience, and build those projections into our goals and strategies.

Governance Committee:

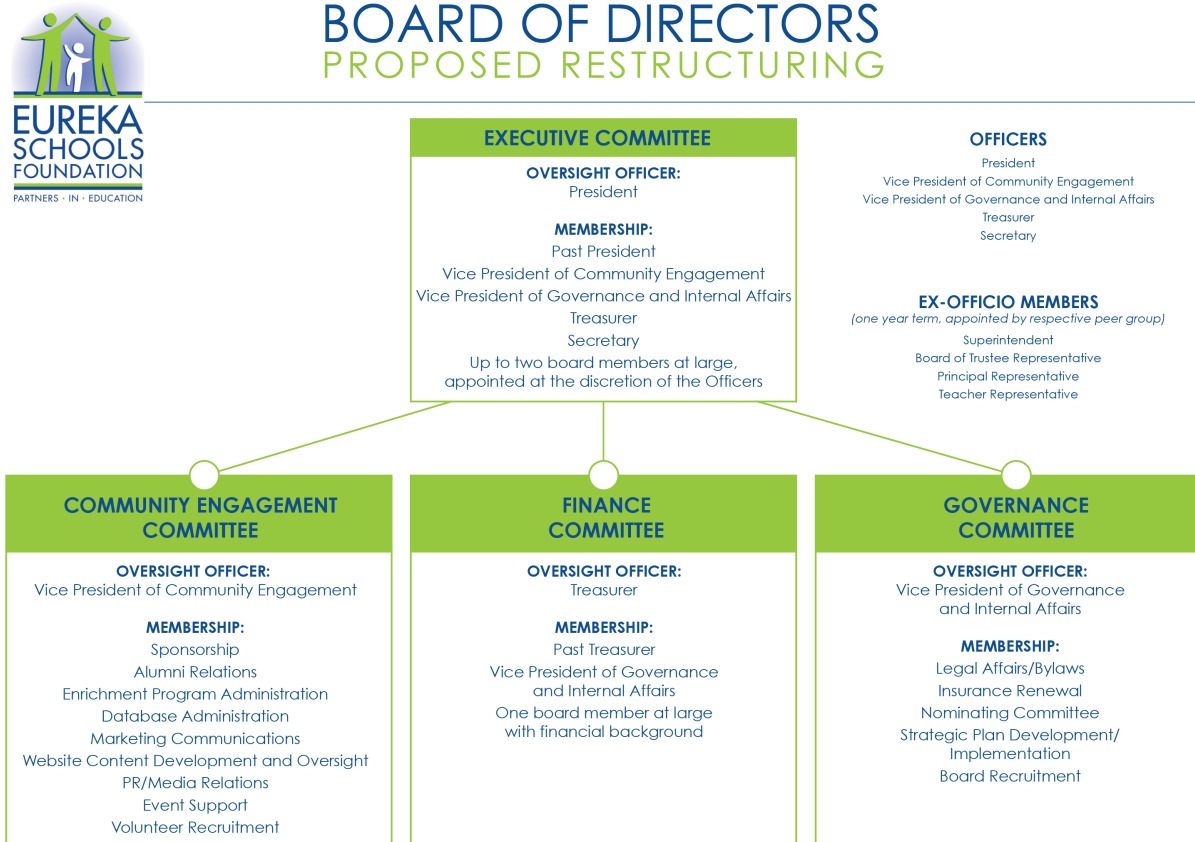
- d) Update this strategic plan and other operational plans as needed to guide the organization short and long term, and actively track our progress.

**Goal 2: VOLUNTEER ORGANIZATION OF CHOICE – Attract, develop and retain the best volunteers.**

Rationale: Volunteers are the lifeblood of our organization. It is critical that we attract talented people to contribute their best in support of ESF.

To ensure ESF is a volunteer organization of choice, we will:

**2.1:** Build the Board as a **model leadership body** that fulfills the fiduciary responsibilities of Board service as well as effectively advance the mission of ESF in the community:



Community Engagement Committee:

- a) Develop a cultivation strategy for recruiting new Board members.
- b) Develop job descriptions for each committee member position. All strategic action steps will be assigned to appropriate committee member job description

Governance Committee:

- c) Develop and maintain a Board members roster that identifies committee membership roles, term status, pertinent skill set and needed skill set.
- d) Develop and administer an individual Board member evaluation survey as well as a collective Board performance survey prior to the next annual planning retreat of the Board.
- e) Develop and conduct new Board member orientation and periodic skill building of all Board members.
- f) Review the Bylaws to reflect Board restructuring and operational changes, as well as ensure national best practices are in place for Board terms, positions, and duties.
- g) Develop job descriptions for each committee member position. All strategic action steps will be assigned to appropriate committee member job description

**2.2:** Develop a **competent pipeline** of Board and non-Board volunteers.

Community Engagement Committee:

- a) Identify non-Board/committee volunteer positions and develop job descriptions for each.
- b) Determine best methods for conducting outreach for available positions.
- c) Identify ESF-PTC liaison at each school and a representative to the PTC president's meetings
- d) Incorporate a plan for school site outreach to ensure participation by a majority of parents.

**2.3:** Establish and support a **culture of accountability** for volunteer service within ESF.

Community Engagement Committee:

- a) Create an annual calendar of volunteer outreach, training, and appreciation events (and opportunities) to ensure a robust process for attracting, engaging, and recognizing volunteers.
- b) Identify current and past volunteers who deserve recognition and make it happen.
- c) Build volunteer recognition into the editorial calendar of ESF's website, newsletters, blasts, and events.

**Goal 3: GROWTH – Grow ESF's revenue opportunities throughout our community.**

Rationale: To continue moving toward our vision, it is vital for ESF to grow our overall revenue across sponsors, parents, alumni and the community-at-large.

To increase revenue, we will:

**3.1: Diversify ESF revenue**, with plans to increase total raised per year.

Community Engagement Committee:

- a) Complete and implement an annual Fundraising Action Plan, including but not limited to sponsors, annual giving, endowment, alumni engagement, events, and planned giving.
  - b) Sponsorship Committee develops tools and provides committee membership training for a systematic and scalable sponsorship program.
-



- c) Pursue alumni engagement in 2015 with intention that our alumni community will own endowment growth and planned giving program.

**3.2:** Increase the **culture of fundraising accountability** at the Board level.

Governance Committee:

- a) Provide quarterly training for all Board members. Schedule training that can take place at Board meetings to coincide with upcoming events, milestones; and schedule training best offered in small group or individual settings based on fluencies of individual board members.
- b) Institute the use of Individual Development Plans (IDPs) for all members of the Board.

**Goal 4: EFFECTIVE COMMUNICATION – Tell the ESF story that provides better understanding of the value we deliver so our stakeholders find greater inspiration to contribute.**

Rationale: Strong communications and ease of access keeps people connected and amplifies our impact.

To maximize our communication effectiveness, we will:

**4.1:** Develop a communications strategy to maintain and **increase engagement with current stakeholders.**

Community Engagement Committee:

- a) Identify success stories from each school and each residential zip code / neighborhood served by the EUSD.
- b) Identify key parents at each school who can help us develop effective messaging within their specific site.
- c) Identify alumni stories from each school and each residential zip code / neighborhood served by the EUSD.
- d) Establish growth goals for each school site, both in terms of dollars raised and volunteers enlisted.

**4.2:** Develop **communications strategies to engage new audiences.**

Community Engagement Committee:

- a) Identify what currently untapped/unengaged audiences we want to reach; and establish metrics for measuring market penetration/ROI.
  - b) Establish a content calendar for digital and print communications.
  - c) Budget for resources needed to reach these audiences.
  - d) Prepare ESF Board members and non-Board volunteers with what message we want delivered, and provide them necessary collateral.
  - e) Implement the communications strategies that are developed.
  - f) Evaluate current and future website needs to support 1) proposed communication strategy and 2) ease of access of all stakeholders across all of ESF activities
-

**4.4: Evaluate communications efforts** by developing metrics and reviewing them on a regular basis, allowing ESF to be responsive and nimble in our messaging.

Community Engagement Committee:

- a. Agree to metrics and a schedule (e.g., quarterly) by which we will evaluate progress.

### **Exhibits**

The following exhibits will be appended to this Strategic Plan and updated not less than annually:

Exhibit 1: Revenue Goals Spreadsheet – to be completed by the Finance Committee

Exhibit 2: Board Roster and Terms – to be completed by the Governance Committee

Exhibit 3: Annual Budget – to be completed by the Finance Committee

Exhibit 4: Annual Master Calendar – to be completed by the Community Engagement Committee