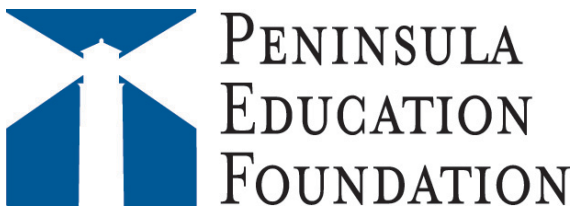


# Peninsula Education Foundation

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*Strategic Plan 2015-2020*

*Adopted October 15, 2015*





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## INTRODUCTION

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Peninsula Education Foundation (PEF) has raised funds and granted them to the Palos Verdes Peninsula Unified School District (PVPUSD) for over 36 years. To help ensure the future effectiveness of PEF's fundraising efforts and create an ever growing impact on student success, the Foundation seeks to create this Strategic Plan as a roadmap.

The ensuing Strategic Plan is the work of a task force formed to review and revise the Foundation's first strategic plan created in 2010. All board members were invited to join the task force. The three primary areas identified for improvement by the group were: 1) Simplify and reduce the number of objectives, 2) Attach metrics to the goals, and 3) Add actions in collaboration with board committee chairs.

This plan was adopted on 10/15/2015 by a unanimous vote of the PEF Board of Trustees. The plan spans up to five school years, but will be reviewed annually.

## VISION STATEMENT

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To ensure PVPUSD has sustainable funding at an optimum level to provide the highest quality public school education now and for future generations.

## MISSION STATEMENT

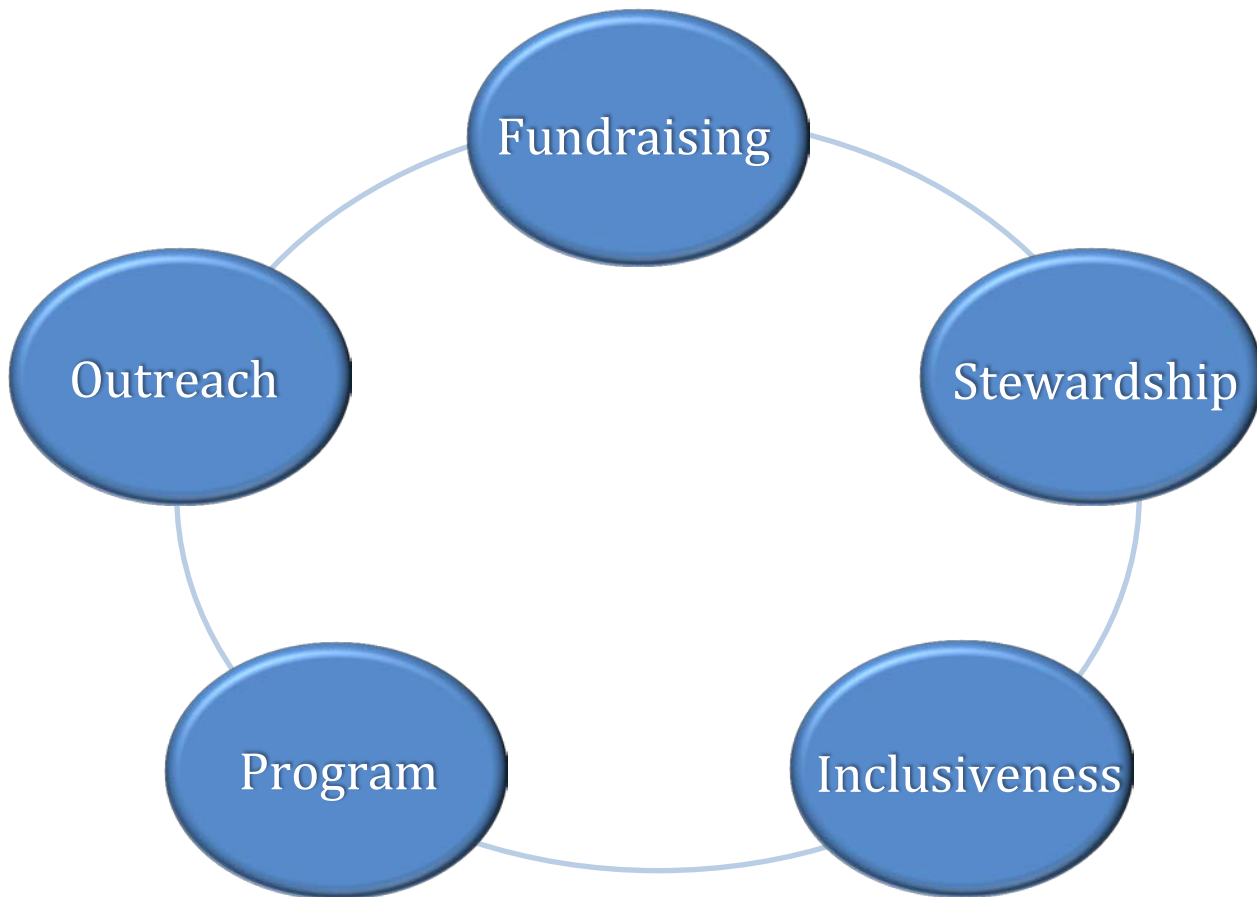
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To engage and inspire our community in support of student success in our local public schools.

## OBJECTIVES

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- 1) Fundraising: Sustain and grow donations to PEF.
- 2) Outreach: Improve communication and awareness of PEF's impact.
- 3) Stewardship: Cultivate and nurture donor relationships.
- 4) Program: Balance district priorities and donor interests to enhance the quality of public education in the PVPUSD.
- 5) Inclusiveness: Expand efforts to be inclusive of our entire community.



## 1) Fundraising: Sustain and grow donations to PEF.

PEF's primary, overarching objective is to consistently increase the funding it provides to the PVPUSD by increasing our annual fundraising as well as our Endowment Fund.

### GOALS:

- Increase our base of school family donors.
- Increase our base of major donors.
- Increase our base of non-school donors/ parents of alumni.
- Increase corporate/ business support.
- Maximize efficiency and profitability of event-based fundraising.

### STRATEGIES:

- Increase school rep effectiveness.
- Early conversion of new school families into PEF donors.
- Approach new major donor prospects and increase conversion rate of regular donors to major donors.
- Increase retention of donors after their students graduate.
- Maximize corporate grants and sponsorship.
- Increase board participation and engagement in fundraising activities.
- Critically evaluate and plan fundraising events to achieve maximum efficiency of staff, volunteer time and profitability.

## 2) Outreach: Improve communication and awareness of PEF's impact.

PEF's communication is the core of educating our donor community. Trustees and staff work in coordination to create and implement a marketing plan that effectively reaches donors and inspires their support.

### GOALS:

- Clear, compelling, professional, cost-effective communication and brand identity.
- Education and engagement of parent, district personnel and community members in the mission of the foundation.
- Continued improvement in the quality of our relationships with principals, district leadership and community stakeholder groups (i.e. PTA, and other parent groups).

### STRATEGIES:

- Utilize a singular message threaded through all avenues of communication.
- Create a marketing plan that reflects outreach goals and outlines actions.
- Engage principals, district personnel and other stakeholder group leadership (PTAs) to be advocates for the foundation.
- Increase trustees' active advocacy for PEF.

### 3) Stewardship: Cultivate and nurture donor relationships.

PEF's long range goals and highest aspirations for impacting students in the PVPUSD rely upon maintaining long-standing donor relationships.

#### **GOALS:**

- Improve overall donor retention.
- Move more annual donors to major donor levels.
- Inspire lifetime giving, including estate gifts and endowment gifts.

#### **STRATEGIES:**

- Create sustainable and documented recognition and stewardship program.
- Increase donor experience at all donation levels.
- Enhance communication and engagement to cultivate major donors.
- Balance of marketing materials that ask for donations versus showcasing impact.
- Promote estate gifts.
- Increase trustee engagement in donor retention.

#### **4) Program: Balance district priorities and donor interests to enhance the quality of public education in the PVPUSD.**

As a key holder of the public trust, PEF funds those programs and staff positions that make a difference for students as determined not only by the PVPUSD, but also by donors' priorities as a group.

##### **GOALS:**

- Fund the district priorities that make PVPUSD schools exceptional.
- Identify and fund programs that our donors value, and are motivated to support.
- Provide a Summer School program that meets student needs while providing a sustainable funding source.

##### **STRATEGIES:**

- Review quality of programs funded as well as programs being considered for PEF funding.
- Increase awareness among donor base about which programs we fund.
- Use forecasting strategies to design Summer School program that meet needs of students and families.



## 5) Inlusiveness: Expand efforts to be inclusive of our entire community.

As a foundation that impacts the entire community, either directly or indirectly -- it is incumbent upon PEF to be a foundation of the community. Donations of every amount are appreciated and encouraged to help PEF in achieving our mission. PEF values socio-economic, gender, ethnic and geographical diversity in our donors, trustees and volunteers.

### GOALS:

- Gain a better understanding of our donor population, and develop practices that embrace all families in the district.
- Effectively raise funds from all economic and geographic demographics in the district.
- Maintain and build a PEF volunteer team that reflects the demographics of our community.

### STRATEGIES:

- Expand outreach to increase geographic and economic diversity of donor and volunteer base.
- Expand outreach to ethnic-based groups, i.e. Chinese, Korean and Japanese parent organizations.
- Engage both parents within each household.
- Maximize trustees' ability to reach out to underrepresented groups.