

Fall Foundations Summit

*Working Together to Build Private Support
for Public Education*

November 7, 2011

Welcome

- Welcome
- Introductions
- Meeting Objectives

History



New Direction of the PUSD Foundation



Strategic Vision:

Maximize Revenue Generation for PUSD and Schools

Best Practices in Educational Fundraising

- Partners in Education (cash and in-kind)
- Traditional Fundraising
(Annual Fund, Special Events, Corp. Sponsorships, Board Member Contributions, Foundation Grants)
- Affinity Marketing & Corporate Partnerships
- District-wide Contracts
- Sponsored Research – Grants & Contracts
- Board Development
- Staffing
- Professional Development – Staff/PUSDF/Site Foundations
(Summits, Intra-district Best Practices, Industry Organizations, Conferences)

Summary of Summer Work Efforts: *Review of PUSD/PUSD Foundation Tangible & Intangible “Assets”*

- Best Practices: District and School Foundations
- PUSDF Historic Income Statements/Balance Sheets
- Site Foundation Form 990s (2005 – 2010)
- Anecdotal Conversations with Site Foundation Volunteers
- Significant Vendor Relationships (\$100K+)
- PUSD Student, Family and Resident Demographics
- Affinity Marketing Programs
- e-Scrip Program
- Marketing Opportunities
- Physical Plant & Facilities
- Surplus Property
- Staffing



Review of Tangible & Intangible Assets: *District Demographics (2010)*

Population:	197,429
Households:	64,930
PUSD Parents:	59,147
Media Age:	39.6 years
Ethnicity:	White 63%
	Asian/PI 20%
	Latino 10%
	Black 2%
	Native AM .3%
	Other/UK 4%
Median Income:	\$95,439 (SD County = \$62,771)
Annual Consumer Expenditures:	\$3.72 Billion

Review of Tangible & Intangible Assets: *Poway Unified School District*

Annual Budget: \$225 million (down from \$270 million)

<u>Schools</u>	<u>No.</u>	<u>Students</u>
Elementary	25	14,826
Middle	6	7,501
High	<u>6</u>	<u>10,248</u>
Total	<u>37</u>	<u>32,575</u>

Benchmark Data:

Historic Fundraising – Annual Totals by School Type

<u>Level</u>	<u>Total Revenues</u>			Cash
	<u>2007-8</u>	<u>2008-9</u>	<u>2009-10</u>	<u>2010</u>
Elementary	\$ 368,027	\$ 416,431	\$ 854,124*	\$840,163
Middle	112,322	111,071	90,676	206,330
High	1,129,280	1,129,636	1,322,873	677,224
PUSDF	<u>211,588</u>	<u>217,010</u>	<u>208,480</u>	<u>98,874</u>
Totals	<u>\$1,821,217</u>	<u>\$1,874,148</u>	<u>\$2,476,153</u>	<u>\$1,822,591</u>

*9 of 18 Site Foundations didn't have Form 990s available for 2007-8 and 2008-9.

Benchmark Data

Historic Fundraising – Averages Per School

<u>Level</u>	<u>Average Revenues Per School Foundation</u>			Cash
	<u>2007-8</u>	<u>2008-9</u>	<u>2009-10</u>	<u>2010</u>
Elementary	\$ 40,892	\$ 46,270	\$ 50,243	\$49,421
Middle	28,081	27,768	22,669	41,266
High	282,320	282,409	330,718	169,306
PUSDF	211,588	217,010	208,480	98,874

PUSD Foundation

Fundraising Plan 2011-12

Fall 2011

- PUSDF Advancement Summit
- Specialty Consultants
 - Fundraising Plan*
 - Affinity Marketing/Corporate Partnership Plan*
- Board Development Plan/By-Law Revisions
- Year 1 Benefit “Package” for Site Foundations

Spring 2012

- Marketing Plan
- Technology Plan/Revamped Website
- Professional Development Plan/Spring PUSD Event
- Districtwide Contract (at least one)
- Initial Affinity Marketing Agreements

Survey Results

You talked, we listened

- Communication/Collaboration
 - PUSDF and District aware of site needs
 - Calendar for fundraising events
 - Directory of Foundation/PTA contacts
 - Sharing best practices
 - Opportunities to collaborate with PTSA's
- Joint/Coordinated Fundraising
 - Grant opportunities
 - Joint major event
 - Donations and sponsors
- Support Technology in the Classroom
 - Teacher training and incentives
 - Hardware in classrooms
- Collaborative Buying Power
 - Insurance
 - Software (including Quickbooks)
 - Other purchases (supplies, copies, computers)
- Professional Association Membership

Benefit Package

Immediate

- Fall/Spring Summit
- Benchmark Data

Survey Results

Your Top Funding Priorities

- 18% Impact Teachers
- 6% P.E.
- 76% Technology

Survey Results

Other Findings

- 100% of Foundations have a special event
 - ~60% between March and May
- 83% have an annual fund drive
 - 78% have participation that is 25% or less
 - 94% include employer match information in letter
 - Employer match = \$90 to \$5,500
 - ~ 3,400 employees from employer match companies live in PUSD
- 22% of responding schools readily share their financials with school families
 - 17% of responding schools don't have a balance sheet

Benefit Package

Immediate

- Fall/Spring Summit
- Benchmark Data
- Tools
 - HEP (100% PUSDF-sponsored)

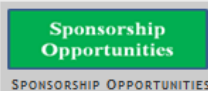
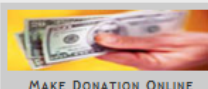


FOUNDATION HOME
Make a Difference

MAKE A DONATION
Give the gift of a bright future

FUNDRAISERS
Support Poway Unified

WAYS YOU CAN HELP
Partner with Poway



The Poway Unified School District Foundation is a 501(c)3 non-profit organization. The Foundation provides financial resources to support K-12 programs.

The PUSD Foundation is focusing its efforts on support in the following areas:

- 1) S.T.E.A.M. (Science, Technology, Engineering, Arts, and Math) Skills for all students;
- 2) College and Career Readiness;
- 3) Rigor, Relevance and Relationships

To date, the PUSD Foundation has provided over \$1.7 million dollars to Poway Unified School District for student programs.

We rely on your support to maintain our standard of excellence in all we do to provide opportunities for the success of our students.

Links...

- [Make a Donation!](#)
- [Fundraisers](#)
- [Matching Gifts](#)
- [Matching Gift Search](#)
- [Media Coverage](#)

Current Fundraisers...

- [Annual Giving Campaign](#)
- [Sponsorship Opportunities](#)

How Donor Data is stored

- 59% Use Excel Spreadsheets
- 24% use QuickBooks as donor database

Benefit Package

Immediate

- Fall/Spring Summit
- Benchmark Data
- Tools
 - HEP (100% PUSDF-sponsored)
 - Donor Tools (group discount)



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Smart Donor Management

Nonprofit software to help charities, churches, and growing organizations make smart decisions and raise more money.

Get Started
(it takes about 20 seconds)
or [browse our user guide](#)

With unlimited users, unlimited donations, smart tags, multiple names, donation splits, online donations, Quickbooks integration, and lots more, we make you look good.

Online Donations
Accept donations online through PayPal.

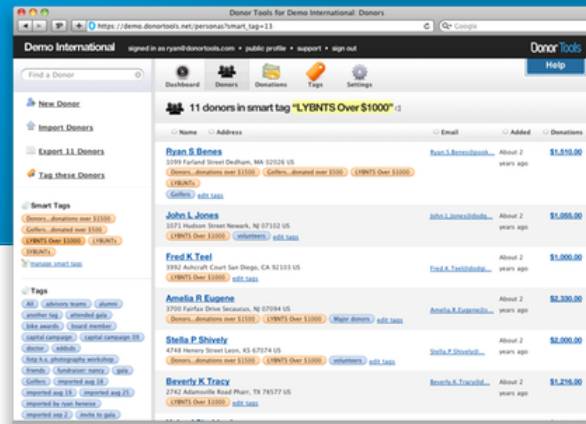
Smart Tags
Automatic grouping, querying, & reporting, always up-to-date

Donation Management
Track your organization's donors and income.

Unlimited Users
Mobilize your team, whether you're one or one hundred.

Open API
Access your donor database

Donor Self-Service
Donors can sign in, view reports.



Your interface is fantastic. Everything I could



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Smart Donor Management

Nonprofit software to help charities, churches, and growing organizations make smart decisions and raise more money.

Get Started
(it takes about 20 seconds)
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With unlimited users, unlimited donations, smart tags, multiple names, donation splits, online donations, Quickbooks integration, and lots more, we make you look good.

Online Donations
Accept donations online through PayPal.

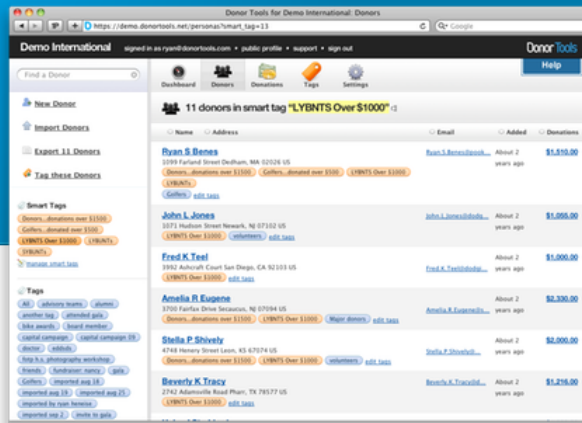
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Donors can sign in, view reports.



Your interface is fantastic. Everything I could

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Upcoming Opportunities

- Continuing Volunteer Education
- Financial Reporting Standards
- Shared Resources/Buying Power
 - Taxes
 - Legal
 - Insurance
 - Auction Software
- Other Ideas

What do you think?

- Feedback Survey (10 minutes)
- Questions and Answers
 - PPT will be posted on PUSDF website
 - www.powayusd.com/foundation
 - Additional thoughts, please contact: Rosanne Brown (858)668-4041 OR rbrown@powayusd.com

Closing

Thank you!