



Rancho Santa Fe Education Foundation  
School Board Presentation  
December 17, 2020

# Rancho Santa Fe Education Foundation



## **Founded in 2007 as a merger of the two prior organizations**

- The Rancho Santa Fe Endowment Fund: Founded in 1997 by ten school families @ \$100K each for the purpose of raising funds to keep class sizes small (20<)
- The Parent Teacher Organization (PTO): Founded in 1982 to coordinate parent volunteers and raise funds for selected student & family enrichments (Halloween Carnival, SDD, Field Day Band, etc).

## **Why did they merge?**

- Confusion & competition among parents led to the erosion of support for both
- PTO began hiring select teaching specialists (math/science)
- Double-up for the same donor base/cause

## **Mission of the RSFEF** *(Bylaws Article 2.1)*

*“The purpose of this Corporation is to maintain small class sizes, to enhance the educational activities and programs of the Rancho Santa Fe Elementary and Middle Schools, and to support the administration, its policies and programming.”*

# RSFEF Organizational Structure



**Board of Trustees**  
RSFEF Chair – **Cheryl Salmen**  
Superintendent (Ex-Officio)  
School Board Representative (Ex-Officio)

**Communications**  
Chair – **Kiesha Bell**,  
Vice-Chair – **Mary Mac Capener**

**Finance**  
Chair – **Veronica Phung**,  
Vice-Chair – **Todd Bennett**

**Other**  
Parliamentarian/Secretary – **Michelle Tree**  
At Large – **Kerry Vinci**

**Support Staff**  
Administrative Support – **Hannah Clements**

**Community Partners**  
Chair – **Edna Lash**  
Vice-Chair – **Stacey Pennington**  
  
*Fundraising for:*  
-Parent Volunteer Events & Programs  
-Annual Giving Team Events  
-Operating & Misc Expenses

**Parent Volunteer**  
Chair – **Karen Wheeler**  
  
Events & Programs  
Examples: Newcomers' Welcome  
Events, Drive-In, Book Fair, Art Auction,  
Other TBD  
  
District Support – Red Ribbon Week,  
Room Parents/Grade Level Liaisons

**Endowment**  
Chair – **Mike Sperlinga**  
Vice-Chair – **Todd Mikles**  
  
*Long-Term Support & Oversight*  
-Legacy/Alumni Gifts  
-Donor Designated Funds  
-Directed Giving Initiatives

**Annual Giving**  
Chair – **Kate Butler**  
Vice-Chair – **Jill Stankoski**  
Ambassadors (At Large) –  
**Julie Guillory**  
  
Red Envelope Day  
Scholars' Circle Recruitment  
Donor Recognition Events (Cap & Gown,  
Scholars' Circle Recognition), Participation  
Events (Phone-a-thon)

# Community Partners

Chair: Edna Lash, VC: Stacey Pennington



## **Funds raised by Community Partners pay for all the expenses of the Education Foundation**

- Parent Volunteer Events (welcome baskets, drive-in, art auction, staff appreciation, etc)
- Annual Giving (red envelope day, thank you events, etc)
- Misc (directory, marketing, subscriptions, all credit card fees, etc)

## **In exchange for investment, Community Partners receive:**

- Advertisement in our printed directory (All)
- Donor Spotlight in school newsletter (Platinum)
- Logo on banner at all RSFEF events (Silver+)
- Business logo or name listed on the online Consumer Guide (Bronze+)

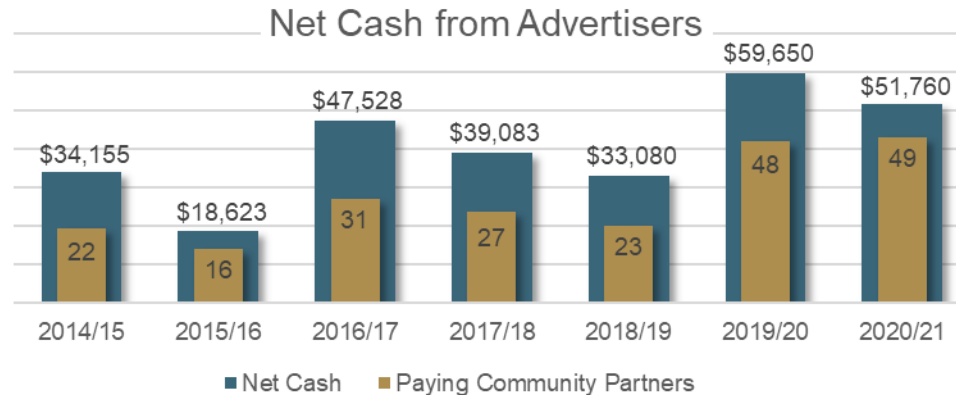
# Community Partners

Chair: Edna Lash, VC: Stacey Pennington



## Update:

- Team effort: prospects came from Education Board, Foundation Board, parents and staff
- Collected \$51,760 to date exceeding this year's goal of \$35k by 48%
- We currently have 49 paying Community Partners. We also have 14 in-kind CPs (value = \$20,600)



# Parent Volunteers

Chair: Karen Wheeler



## Welcome Baskets for Newcomers:

- Pool parties cancelled due to Covid
- All new families received a welcome basket with gifts from the Foundation & Community Partners
- Drive-through at Roger Rowe on Aug 17<sup>th</sup> where families could meet Donna Tripi, Megan Loh, and John Galipault
- Rest of the baskets were hand delivered to homes
- In total, 63 baskets were distributed

## Kindergarten Popsicle Drive-Through:

- Kindergarten welcome party cancelled due to Covid
- Hosted a popsicle drive-through on Aug 20<sup>th</sup> where families could meet Donna Tripi, Megan Loh, John Galipault and the Kindergarten teachers

## 2 Drive-In Movie Nights: Playing with Fire & the Addams Family

- Organized by *Kirstin Helms, Jill Stankoski*
- First event had 40 families; Second event had 45 families
- Second drive-in sold out in 38 minutes

## Book Fair: Week of Dec 7<sup>th</sup>

- Organized by *Hazel Bentinck*
- Held outside in the courtyard due to Covid



# Parent Volunteers

Chair: Karen Wheeler



## Ongoing Volunteer Coordination:

- Staff Appreciation (*Chondra Brown & Amy Jones*)
  - 2-3 Staff Appreciation Luncheons by Community Partners
  - Monthly treats and birthday gifts of appreciation
- Spirit Shop (*Brenda Hand*)
- Grade Level Liaisons
- Room Parents

## Upcoming Events:

- Art Auction (*Paige Pennock & Fatima Grismer*)
  - Date: Friday, May 14<sup>th</sup>
  - Event will be either virtual or in-person depending on Covid orders

## Ideas for Spring Events:

- Virtual Magic Show (TBD – Jan)
- Father/Daughter Bike Ride (TBD – Feb/Mar)
- Parent/Child Tennis or Pickle Ball Tournament (TBD)
- Roger Rowe Geocaching Challenge (TBD)
- Spring Drive-in Movie Night (TBD)

# Endowment

Chair: Mike Sperlinga, VC: Todd Mikles



**Current Status of Endowment is \$5,964,755** (as of 12/16/20)

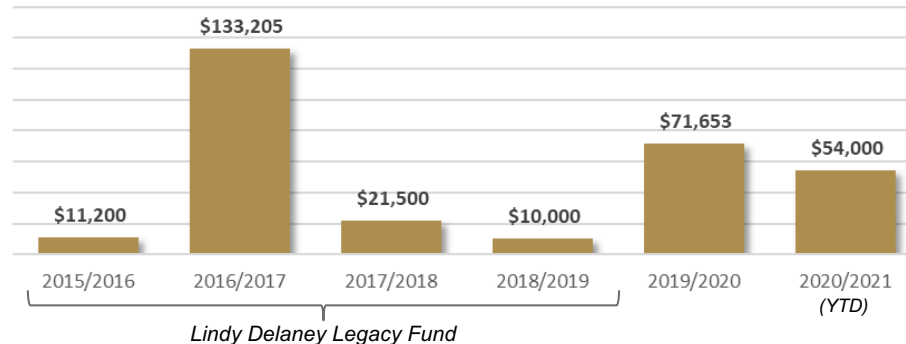
**Endowment distributions have increased each year as the fund grows**

- Distribution calculated based on a 12-quarter trailing average
- Last few years has been a 4% dispersement
- Distribution for the 2020/21 school year is \$209,311

**10% of annual giving contributions go back to the Endowment**

- To date, we have invested \$54,000 back into the Endowment this year

**Endowment Contributions**





# Annual Giving

Chair: Kate Butler, VC: Jill Stankoski, At Large: Julie Guillory



## **Fundraising Events**

- All events to fundraise cancelled this year due to Covid (Welcome Parties, Newcomers Night Out, Scholars' Circle Recruitment)
- Red Envelope Day modified to be socially distanced – minimal volunteers & minimal festivities
- All fundraising this year due to emails and with help of Parent Volunteer events

## **Upcoming Events**

### **Cap & Gown Thank You Event**

- Event for families who've donated at or above Cap & Gown (\$2,500+)
- Potential double header Drive-in Movie Night (TBD Feb/Mar)
- Timing dependent upon latest surge in Covid and stay-at-home orders

### **Scholars' Circle Reception Event**

- Event for members of the Scholars' Circle (\$7,000+)
- Potential evening event if possible (May/Jun)
- Event dependent upon Covid and social distancing requirement

# Annual Giving

Chair: Kate Butler, VC: Jill Stankoski, At Large: Julie Guillory



## Annual Grant Update

- Raised 110% of goal YTD with 6 months remaining
- YTD Cash to District: ~\$700k
- YTD Cash to Endowment: \$54k

## Scholars' Circle Members

- 12 new Scholars' Circle Families (1 Magna CL, 11 CL)
- 33 Active Scholars' Circle Families (23 SC Completed Families)
- Scholars' Circle is important as it allows the school to budget for long-term goals

## Participation of Families

- Total Family Participation: 56.6%
- New Family Participation: 72.9%
- Participation is the key to forging and maintaining relationships with businesses who become our Community Partners as it shows them that our school families support the Foundation's endeavors

## Annual Giving



# Foundation Next Steps



## **Continue bring Community Building Events for this year**

- Lots of ideas for creative community building that is socially distanced

## **Upcoming Art Auction to raise funds for the Foundation**

- Save the date: Friday, May 14th
- Funds we raise at this event will help pay for our community building events and operating expenses
- We have some really exciting items that are already lined up for auction

## **Fundraising for a Covid Response Fund and to increase Participation**

- School needs funds to help offset the increased needs due to the surge and to keep the school open
- Participation is critical for future fundraising efforts to provide more community events