



U-46 Educational Foundation Strategic Plan 2019-2024



Speakers:

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Foundation: 2006-2019

Distribution to date: \$760,000 to programs and students





In 2019, the District and the U-46 Educational Foundation embarked on a Strategic Planning Project with the following goals:

- Goal 1: To validate the current plan, review and revise the goals and objectives as needed, add benchmarks, and identify action items.
- Goal 2: To build consensus and support from stakeholders by conducting community engagement sessions and an online survey.
- Goal 3: To present a new five-year strategic plan to the Educational Foundation Board for adoption at the beginning of the 2019-2020 school year.
- Goal 4: To present a Foundation Strategic Plan to the U-46 Board of Education.
- Goal 5: To develop a job description for the Foundation Executive Director.
- Goal 6: To develop the framework for an alumni relations plan.

PHASE I: Engage



Document the current state of reality and the desired future position of the foundation.

PHASE II: Focus



Create framework for the broad direction and priorities of the future in a formal strategic plan document.

PHASE III: Execute



Document specific steps that will be taken in order to accomplish the goals and objectives identified in the strategic plan.

Survey Response

The high level of survey responses - more than 1,100 - along with the participation in the interviews and the focus groups, are strong indicators of the support that the community, parents, and staff demonstrate for the school district.

Group	Interview/Focus Group Participants	Online Survey
Board of Education	2	NA
Community Members*	25	NA
English Respondents	NA	1047
Focus Groups	51	NA
Foundation Board Members, Ex Officio Trustee, District Liaison & Facilitator	13	NA
Graduates	NA	143
Non-teaching Staff	NA	289
Parents	NA	730
Spanish Speaking Respondents	NA	95
Students	NA	18
Teachers and Administrators	NA	280

Survey Results



Positive Outcomes

Strong sense of caring for children and a sense of community in U-46.

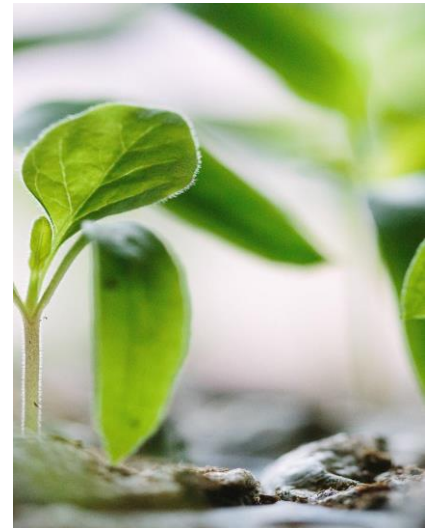
85% respondents said satisfied with schools.

More than 50% donate to schools.

56.5% supported past Foundation programs and consider them important and valuable to U-46 students.

Areas for Growth

- Seventy-six percent of parents were not familiar with the work of the Foundation.
- Limited knowledge as to how the funds are prioritized.



Mission, Vision, and Goals

Investing in the future, the U-46 Educational Foundation develops and dedicates resources, supports innovation, and creates partnerships to enhance student learning and well-being.

Expanded opportunities for all U-46 students in a changing world.

Strategic Goals

- Develop and implement a staffing and Board development plan.
- Develop, implement, and evaluate annual and long-term fundraising plans.
- Develop, implement, and evaluate a U-46 Educational Foundation marketing and communications plan.
- Continually review the process for the Foundation's distribution of funds.
- Create annual benchmarks for the Foundation.
- Determine annual funding priorities.

Educational Foundation Board Responsibilities

Current Responsibilities	Recommended Additional Responsibilities
Reviewing, approving, and monitoring budget	
Fundraising	Attend Foundation fundraising functions
Oversight for implementation of policies and programs	Provide feedback for evaluating Foundation's Executive Director
Will give "a substantial financial donation" based on personal circumstances	Raise or make a significant donation
Promote the Foundation and encourage support	
Attend Foundation Board meetings and serve on at least one committee	Alternate monthly and committee meetings
Support the "health and well-being" of the organization	

Executive Director's Role

- Strategic leader
- Fosters growth of the Foundation's philanthropic landscape
- Targets to quadruple in size over the next five years
- Goal: Generate an annual fundraising goal of \$500,000 to 700,000 by 2029

Executive Director Job Description:

- **Leadership:** Collaborate with and support the Board's focus on results and accountability.
- **Fundraising:** Expand development efforts.
- **Marketing:** Develop and direct all marketing collateral including social media, annual reports, emails, and presentations.
- **Finance:** Oversee the annual operating budget.

Alumni Framework

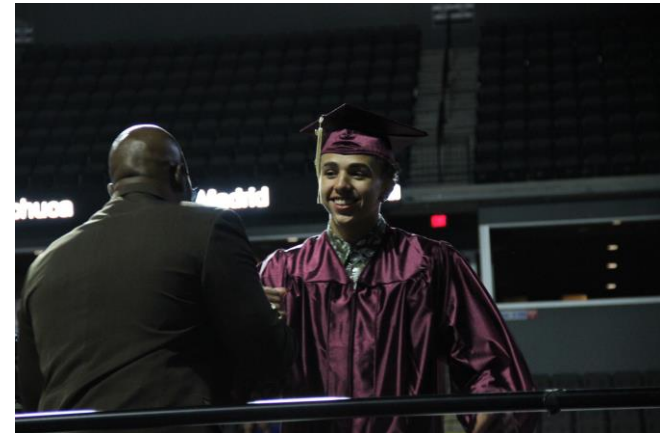
Years One and Two

- Develop Alumni Relations database
- Develop outreach efforts: i.e. alumni social media accounts
- Prepare an annual report focused on alumni and teachers



Years Three and Beyond

- Create an alumni board and hire alumni director
- Continued communications and outreach
- Sponsor one free alumni event a year



Proposed Funding Model

Year	District Contribution	Foundation Contribution
2019-20	100% of Executive Director's Compensation; continues existing staff support	
2020-21	100% of Executive Director's compensation; additional clerical and accounting support; 50% of data management and accounting systems through 2028-29	50% of data management and accounting systems through 2028-29
2021-22	90% of Executive Director's compensation; additional clerical and accounting support	10% of Executive Director's compensation
2022-23	80% of Executive Director's compensation; additional clerical and accounting support	20% of Executive Director's compensation
2023-24	50% of Executive Director's compensation; additional clerical and accounting support	50% of Executive Director's compensation
2024-25	40% of Executive Director's compensation; 50% clerical and accounting support	60% of Executive Director's compensation; 50% of clerical/accounting work
2025-26	50% clerical and accounting support through 2028-29	100% of Executive Director's compensation; 50% of clerical/accounting work

Next Steps

- Develop metrics/measurable goals
- Develop and implement a timeline
- Hire Foundation Executive Director
- Develop a framework for alumni relations
- Annually evaluate strategic goals and objectives



Questions? Preguntas?

