

# CAF Strategic Plan

Presentation to CAF Board  
November 27, 2017

2018 to 2022

# **CAF STRATEGIC PLAN**

## CAF Strategic Planning Approach Summary

- Over an eight week period, a CAF working group (made up of seven CAF board members, the Carlmont principal and a facilitator) developed the following strategic plan through 2022.
- The strategic planning process involved many hours of work, weekly meetings and outreach to outside groups by the team members.
- The results of the Strategic Planning process have been summarized as:
  - Day-in-the-Life of (a) Students, (b) Teachers/Staff and (c) Parents in 2022.
  - Annual goals & metrics CAF strives to achieve from today to 2022.
  - Plans to implement each major strategic objective, with specific actions, due dates and action owners.
- The CAF strategic planning team looks forward to continued refinement and improvements to these plans working with the CAF Board and our stakeholders in providing the best education possible to the students of Carlmont and our community.

CAF STRATEGIC PLAN 2018-2022

# **DAY-IN-THE-LIFE AT 2022**

## CAF at 5 Years – Student Life

CAF funding reduces average class size from 35+ to 30

*"With only 30 students in a class, I get so much more feedback on my English paper. Now I know how to make my next paper even better!"*

*"Trigonometry is hard!! I'm heading to the after school tutoring center today."*

After school tutoring center: funded by CAF!

*"So many great choices, which class do I choose? Should I take Leadership, Instrumental Music or Digital Arts?"*

*"College applications are confusing! Thankfully I can go the College and Career Center for help with my future plans!"*

CAF funds 25 additional classes at CHS, allowing your child to explore and grow!

CAF funding provides a staffed college and career center

*"There's no one else I can talk to about my struggles at home and with my schoolwork, so I'm glad my counselor has time to see me!"*

CAF funding improves the Counselor to Student Ratio



*"With all these offerings, I already have credit for college before I've even started!!"*

CAF funding enriches a curriculum that includes many AP and college credit courses

**Our Strategy: A well rounded, successful student!!**

# CAF at 5 Years – Day in the Life for Teachers & Staff

## CAF funding reduces class sizes

*Having fewer students in my classes means that I can give each student more individualized attention. I can give my students higher quality feedback on their assignments and better able to assess their academic needs to offer the kind of help they need.*



Carlmont Teacher in Action (Sophie Penn, Photographer 2016)

## Professional Development and Collaboration Time

*CAF helped fund my attendance at (fill in prof. Dev.). I came back motivated to introduce (fill in) into my classroom, and with the extra collaboration time that CAF funding provides I am able to share these new methods with my colleagues.*

## CAF adds to supply budget

*I have all of the supplies I need including supplemental materials. In my classroom my students now have (fill in), increasing engagement and depth of learning.*

# CAF at 5 Years – Experience of a Carlmont Parent at *Back to School Night*

1<sup>st</sup> stop: While eating Dinner in the Quad, I stop by the CAF table for one-stop shopping .

With one payment, I'm able to support CAF and know that my donation will support the greatest needs at Carlmont including BTI, music, and robotics!



2<sup>nd</sup> Stop: We walk past the counseling center in order to meet my student's counselor. It's been great to know that we now have a true partnership with the counselor since her case load has dropped.



Stop Three: Time to see the teachers. Wow – what a difference a few years makes! When my older child was at Carlmont the teachers seemed a little overwhelmed. I asked my student's favorite teacher what has changed and he said it was because his classes now have 30 or less kids in each section. English teachers have more time for insightful comments on papers. Math and science teachers can spot those kids who need more assistance with problems. It's like they are at a private school but in a public setting!



CAF STRATEGIC PLAN 2018-2022

# **STRATEGIC GOALS AND METRICS**



# CAF Value to Carlmont at 1, 3 and 5 Years

CAF Value to Carlmont	2017 (Today)	2018 (1 Year)	2020 (3 Years)	2022 (5 Years)
Total Funds Raised	\$574,000	\$630,000	\$825,000	\$1,075,000
Average Class Size	35+	35	32	30
# Class Sections Funded	15	17	20	25
# Guidance Counselors Funded	0	0	1	2
IT Support FTE funded	0	0	0.5	1

Why it matters...

Class Size	Class Sections	Guidance Counselors	IT Support
Smaller class sizes has been proven to improve student performance and teacher morale.	More class sections allow Carlmont to offer more course selection and smaller class sizes.	More guidance counselors improve student health, planning and college preparation.	Technology and IT support create new learning possibilities for students.

CAF STRATEGIC PLAN 2018-2022

# **STRATEGIC OBJECTIVES AND IMPLEMENTATION PLANS**

# Who are we? What is CAF's Purpose?

## Description

- Determine where Carlmont as a school wants to be and how CAF should support those goals.
- Determine what CAF wants to become. Is the goal to raise more money? If so, for what and why? Should CAF do a few things well or do a lot of things mediocre? What would CAF do if we had another \$500k? \$1MM?

## Measurable Goal(s)

*Determine the school academic related needs that are impacting the vast majority of the student population to be able to have a clear fundraising plan/objective for the years to come.*

Completed by:

03/31/2018

## Benefit

*Will help determine our messaging strategy, so we have a consistent communication when reaching out to parents and community.*

## Supports CAF

*Check all that this objective supports...*

☒ Students

☒ Community

☒ Teachers & Staff

☒ Volunteers

☒ Donors

☒ Other Groups

## Action Plan

### Action Item

*Determine the funding priorities*

*Get approval from the Board of the funding priorities*

*Determine a timeline to reach the objectives*

### Owner

Group #1

CAF Board

CAF Board

### Due Date

Done

Dec-17

Mar-18

### Dependencies

Attendance at board meeting discussion

To coordinate with fundraising team to enable new fundings

## Output

*We have a first proposal that will need to be reviewed regularly to ensure priorities have not changed.*

## Who are we? What is CAF's purpose?

- CAF is committed to continuing support of Carlmont High School in enriching the educational environment for all students through the funding for essential educational programs that will have broad based, substantial and lasting impact.
- We want to help provide a nurturing and thriving educational environment to all students and teachers.
- We target the biggest impact with the lowest dollars spent.
- We want to be flexible, innovative and inclusive when deciding on our funding priorities.
- This requires a continued partnership between the Foundation and the Principal.

# Who are we? What is CAF's purpose?

## Proposal of Key Funding Objectives:

- 10 additional class sections for a total of 25 classes
  - Why: this will enable a 30:1 ratio with current enrollment. If enrollment increases, the school district will increase funding. So 30:1 ratio should not be at risk.
  - Cost: \$550k
  - Incremental costs as compared to current budget: \$220k
- 2 additional Guidance Counselors
  - Why: will decrease the guidance counselor caseload ratio to below 250-1 (which is national average). Having fewer students, the counselors can take the time to really know their students (regular 1:1 time), play a real guiding academic path role and will also develop an environment for more psychological assistance as needed i.e. counseling the whole child and not just the academic aspect. The parents will need education around the role of the counselors to inform them about how the enhancement of this department can benefit all the kids. Counselors' role and its benefits are not obvious to all parents.
  - Cost: \$220k
  - Incremental costs as compared to current budget: \$220k

# Who are we? What is CAF's purpose?

## Proposal of Key Funding Objectives (continued):

- Technical/Maintenance support to the IT/chromebooks deployment:
  - Why: as the school deploys more technology (the school district is getting ready in supplying more chromebooks, 1-1 target), technological support is needed to support all IT assets: smart boards, teachers' computers, students' chromebooks, computer labs....
  - Cost: \$60k
  - Incremental costs: \$60k
  - It is a position that can be funded over time, starting with part-time support.
- **Other funding ideas:**
  - Supplies: Toner for all classes: \$10-12k
  - PSAT funding: \$16k
  - Need to follow up on senior essay support pilot
  - Get a list of other needs (admin and other) not easily sellable to parents but that could benefit the overall school environment.

## CAF/BTI Partnership

Description

*Bring Biotech Institute under CAF umbrella.*

Measurable Goal(s)

*Signed MOU between CAF and BTI: Partnership expectations in writing and agreed to by all parties.*

Completed by:

11/24/17

Benefit

*Benefit overall Carlmont community by supporting BTI in their efforts to raise the funds they need while simultaneously encouraging, between CAF and BTI, mutual promotion, coordinated messaging, and shared resources.*

Supports CAF

*Check all that this objective supports...*

- ☒ Students  
☒ Teachers & Staff  
☒ Donors

- ☒ Community  
☒ Volunteers  
☒ Other Groups

Action Plan

Action Item

Owner

Due Date

Dependencies

*Generate Memorandum of Understanding*

Working Group 2

11/10/17

Legal review

*Review of Draft MOU by Strategic Planning Group and Exec Committee*

Group

11/13/17

Aggressive timeline

*BTI agreement to MOU*

Ulla

11/21/17

BTI

Output

*Partnership between CAF and BTI, agreement signed by CAF Presidents, BTI Faculty Directors, BTI Director of Mentor Services, Carlmont Principal*

*Review of Onboarding Process into CAF*

<b>Description</b>	<i>Establish standard procedures for bringing interested fundraising parties under CAF umbrella</i>			
<b>Measurable Goal(s)</b>	<i>Boilerplate MOU</i>			
	Completed by:	06/07/17		
<b>Benefit</b>	<i>Streamline process for any future partnerships.</i>			
<b>Supports CAF</b>	<i>Check all that this objective supports...</i>			
	<input checked="" type="checkbox"/> <i>Students</i> <input checked="" type="checkbox"/> <i>Community</i> <input checked="" type="checkbox"/> <i>Teachers &amp; Staff</i> <input checked="" type="checkbox"/> <i>Volunteers</i> <input checked="" type="checkbox"/> <i>Donors</i> <input checked="" type="checkbox"/> <i>Other Groups</i>			
<b>Action Plan</b>	Action Item	Owner	Due Date	Dependencies
	<i>Complete MOU with BTI</i>	Working Group 2	11/21/17	
	<i>Review process after first full quarter</i>	Working Group 2	05/01/18	
	<i>Solicit feedback from CAF and BTI Boards</i>	Working Group 2	05/21/18	
	<i>Finalize Boilerplate MOU</i>	Working Group 2	06/07/18	
<b>Output</b>	<i>Boilerplate MOU for bringing CHS fundraising organizations under the CAF umbrella.</i>			



## Raise Ask Per Student

Description	Raise ask to \$1,200 per student			
	Measurable Goal(s)	1. Amount of money raised will increase 2. Number of participating families will not decrease		
	Completed by:	07/01/2019		
Benefit	1. Raised ask will increase donations to CAF. 2. Ask will be better aligned with feeder school's education foundations asks.			
	Supports CAF	Check all that this objective supports... <input checked="" type="checkbox"/> Students <input type="checkbox"/> Community <input checked="" type="checkbox"/> Teachers & Staff <input type="checkbox"/> Volunteers <input type="checkbox"/> Donors <input type="checkbox"/> Other Groups		
Action Plan	Action Item	Owner	Due Date	Dependencies
	Change ask amount in marketing materials	Marketing Team	Fall, 2017	
	Write "white paper" on reasons for increased ask	Executive Committee	Fall, 2017	
	New level introduced to the existing community & incoming freshman families	Marketing Team	Spring 2018	
Output	Increase in annual revenue			

## Raise Leadership Circle Level

Description

*Raise Leadership Circle entry level to \$3,000.*

Measurable Goal(s)

1. Amount of money raised will increase
2. Number of participating families will not decrease

Completed by:

07/01/2019

Benefit

1. Raised ask will increase donations to CAF.
2. Ask will be better aligned with feeder schools education foundations asks.

Supports CAF

*Check all that this objective supports...*

- |  |                                       |
|--|---------------------------------------|
| <input checked="" type="checkbox"/> Students         | <input type="checkbox"/> Community    |
| <input checked="" type="checkbox"/> Teachers & Staff | <input type="checkbox"/> Volunteers   |
| <input type="checkbox"/> Donors                      | <input type="checkbox"/> Other Groups |

Action Plan

Action Item	Owner	Due Date	Dependencies
<i>Change ask amount in marketing materials</i>	Marketing Team	Fall, 2017	
<i>Write "white paper" on reasons for increased ask.</i>	Executive Committee	Fall, 2017	
<i>New level introduced to the existing community &amp; incoming freshman families</i>	Marketing Team	Spring 2018	

Output

*Increase in annual revenue*

## Hire Executive Director

Description

*Consider hiring Executive Director once the CAF revenue reaches \$1M*

Measurable Goal(s)

1. Revenue for year is over \$1M
2. ED brings additional money over and beyond salary

Completed by:

07/01/2018

Benefit

1. Single point person to actively pursue development
2. Administrative duties perform
3. Overview of operations managed

Supports CAF

*Check all that this objective supports...*

- |  |  |
|--|--|
| <input type="checkbox"/> Students                    | <input checked="" type="checkbox"/> Community    |
| <input checked="" type="checkbox"/> Teachers & Staff | <input checked="" type="checkbox"/> Volunteers   |
| <input checked="" type="checkbox"/> Donors           | <input checked="" type="checkbox"/> Other Groups |

Action Plan

Action Item	Owner	Due Date	Dependencies
<i>Create either part-time or full time role</i>	Executive Board		Amount raised in prior year
<i>Outline responsibilities of position</i>	Executive Board		Amount raised in prior year
<i>Review duties and responsibilities</i>			

Output

*CAF would have a paid employee.*

Fall 2017

# **CAF STRATEGIC PLANNING APPROACH**

# CAF Strategic Planning Process Overview

## Scoping & Planning 9/25 – 10/1

- Kick-off & Logistics
- Scoping & Prioritization
- Team Structure
- Approach & Timeline

## Brainstorming in Working Groups 10/2 - 10/8

- Initial Brainstorming in Working Groups
- Develop Action Plans for follow-up / data
- Boundary Conditions

## Analysis, Research & Benchmarking 10/9 – 10/22

- Implement action plans to obtain more supporting analysis and benchmarking
- Draft status report

## Board Check-point and Feedback 10/23 – 10/29

- Full Board provide feedback on status
- Collect & summarize Board feedback; Publish to All

## Drafting of Integrated Strategic Plan 10/30 - 11/5

- Integrate the Strategic Plan Concepts
- Working Groups assess impacts of other team outputs; update Plans

## Final Reviews, Edits and Publishing: Strategic Plan 11/13 – 11/30

- Publish Draft by 11/13
- Board Presentation 11/27
- Publish Final by 11/30

# Top CAF Goals and Strategic Planning Objectives

## **Who are we? What is CAF's Purpose?**

- Determine where Carlmont as a school wants to be and how CAF should support those goals.
- Determine what CAF wants to become. Is the goal to raise more money? If so, for what and why? Should CAF do a few things well or do a lot of things mediocre? What would CAF do if we had another \$500k? \$1MM?

## **How does CAF work with others to achieve its goals?**

- Evaluate how to engage with school groups outside of the CAF Board
- Establish policies for earmarking funds / establishing partnerships with other school organizations (boosters, arts councils, BTI, etc.)

## **How does CAF do it? What are the tactics to maximize our value?**

- Evaluate and recommend fundraising process, ask amount, approach, timeline
- Evaluate and recommend Leadership Circle levels, value and what CAF does for its largest donors
- Perform benchmarking with other academic foundations with similar characteristics.
- Develop timeline for hiring part-time Executive Director or some sort of hired help.

# CAF Strategic Planning Working Team Structure

## Working Group 1 - CAF's Purpose

- Claire Sebti\*
- Ralph Crame
- Cheryl Selman

## Working Group 2 - CAF's Work With Outside Groups

- Ulla Foehr\*
- Patty Bove
- Clarissa Naftzger

## Working Group 3 - CAF's Tactics

- Matthew English\*
- Lisa Bernstein
- April Carlson

- = scribe and report-out responsibility at full team calls
- Supporting: Jeff Selman, CAF legal counsel

# Boundary Conditions

“Boundary Conditions” are criteria that are absolute. If an idea, tactic, strategy, goal or action violates one of the boundary conditions, it must be discarded.

- The CAF board has a fiduciary duty to oversee the assets of CAF (which is all funds that are collected by CAF) and to make sure that they are utilized in furtherance of CAF’s public mission to support the academic programs of the school. To the extent that CAF is being used by other organizations to receive funds for which the donors are able to claim a charitable contribution because the money has been contributed to CAF, these donations need to be considered assets of CAF. That could be differentiated from money that comes into the cart to pay for items such as yearbooks, PE clothes, etc., and that is only passing through a CAF account because CAF maintains the cart.
- CAF needs to report all of the funds that it collects that become its assets for both accounting and tax purposes to the various government oversight entities (tax authorities, California Attorney General),
- CAF needs to treat these collections as revenue for purposes of determining whether it has exceeded \$2 million in revenues for audit purposes.
- For all donors exceeding the requisite individual tax letter threshold, CAF needs to provide the annual written tax letter of the amount donated for which a donor is claiming a charitable contribution.
- CAF cannot participate in extensive lobbying and political causes. Of course, we can support bond and parcel tax measures but in order to maintain its 501(c) (3) status, lobbying activities cannot be “substantial” in relation to its other activities.
- CAF will not take any action that is in violation of Federal, State law, tax law or local regulations.