

SCEF Fundraising Plan for the 2015-16 School Year  
Approved by SCEF Board on \_\_9/21/2015 FINAL

Per SCSD Board policy we are submitting the following fundraising plan.

1. SCEF Fundraising Plan, 2015-16

We will endeavor to raise **\$2.4 million** this fiscal year. After expenses and endowment distribution, our hope is to be able to donate close to \$2.3 million to SCSD and SCCLC. This gross fundraising revenue will include a combination of restricted and unrestricted donations. The requested annual fund donation per student is **\$1,200**. Our goal for Spring Gala is a minimum of \$500,000 net toward this goal (this includes Fund-a-Need).

We will conduct an annual fund campaign. Our fiscal year runs July 1, 2015 through June 31, 2016. We have reached agreement with PTA CC that we will start fundraising in August. There will no longer be a quiet period. Fundraising efforts will include:

- Kinder Socials and Back to School Nights
- Appeal mailings/emails to parents
- Newsletter entries in school newsletters including messages from Principals
- Occasional "eBlasts" from the SCEF President, SCSD Superintendent and Principals encouraging parents to support SCEF
- Coordinate with the District Office to send a back to school mailing to all district families
- Coordinate with the District Office to send a SCEF communication to new/incoming families in April
- SCEF Days scheduled for Nov. 4 and May 18
- Major Donor Reception event in the Fall, Leadership Circle Reception in Fall and Prospect event in the Winter/Spring
  - Leadership Circle is the name we give to our major donors group. At this time, this group includes those who have donated **\$3,500** or more. We "count" gifts to the annual fund, Fund-a-Need gifts, and Gala/Online/TOWN auction purchases. We have added benefits for donations at higher levels. (see matrix)

SCEF will produce the following fundraising events:

- **Evening at Town**, September 27, 2015.
- **Online Auction**. Again this year, we will conduct an on-line auction in February 2016, which will allow all parents/extended family to bid on School Items, Teacher Outings and Summer Camps. Each PTA is providing a \$1,000 sponsorship to help underwrite the cost of teacher outings.
- **SCEF Spring Gala** (formerly Spring Fling) (PTACC is a co-sponsor), March 19, 2016, Sofitel, Redwood Shores
- **Hometown Days/SCEF Celebrates Music, May 20, 2016**
- **San Carlos Night at the Giants** (in partnership with Park & Recreation Department), June 2016

At times we will partner with local businesses where a percentage of purchases are donated to SCEF (Whole Foods, Devils Canyon, Honey Bear Christmas trees, Bianchinis, etc.). This list is not all-inclusive.

SCEF plans to host an additional outreach event for Kinder parents in January and for incoming families in May. SCEF may conduct a student art/essay contest. Winning entries will win prizes.

SCEF is continuing to build our business outreach.

SCEF will launch a new endowment campaign this fiscal year.

SCEF will explore grant opportunities to support District initiatives

SCEF has produced a video that will be on its website and shown to parents at Back to School nights

In addition to the school newsletters mentioned above, SCEF will communicate with donors and others through use of its website, Facebook account, Twitter, news releases, and emails directly from SCEF or through our SCEF Reps/Spring Fling Reps at each school. Those communications that go through school district means will be submitted to the district for approval. Those that go directly to our donor base or externally to the broader community will not be submitted for approval. As a 501(c) 3 non-profit, SCEF publishes and mails an annual report to parents and supporters each year.

## 2. USE OF FUNDS

Please refer to the attached document regarding SCEF's annual grant to the SCSD and SCCLC.

SCEF board members met with the Superintendent in August 2015 to discuss the use of unrestricted funds raised in FY 15. The following is an estimated distribution of the FY15 unrestricted grant provided by SCSD staff. It is understood that the exact percentages/dollars dedicated to each purpose may change based on other funding sources or changes in expenses during the year.

<u>Purpose</u>	<u>amount contributed by SCEF</u>
K-3 smaller class size	\$356,746
Middle school electives	\$356,746
Elementary school music	\$102,288
Enrichment programs (PE, library, literacy)	\$283,433
Counselors/nursing	\$231,346
STEM (tech, science)	\$457,640
Field Trips	\$ 60,000 (see below)
Principal Flex Funds	\$226,265 (see below)
Educator Innovation Fund	\$44,850 (balance at \$98k)

SCEF will endeavor to raise funds during the 2015-16 school-year for similar purposes (although it is understood that percentages and dollar amounts may differ). SCEF representatives will meet with the Superintendent over the summer to discuss the District's estimate for use of SCEF funds raised during 2015-16, to be granted for school-year 16/17.

Fund-A-Need dollars raised in FY15 (\$112,125) are restricted to Personalized Learning purchases. These funds were raised to allow the District to begin to introduce personalized learning programs and tools at each school. They are distributed by ADA.

In the 15-16 school year the need target/goal for FY15 will be a school "wish list". Each school will submit a wish list of projects/school needs up to \$25,000 (elementary) \$35,000 (middle) that will be funded depending on the total raised as part of the Fund-a-Need Campaign. The money will be pooled and distributed according to ADA.

As was the case last year, Principal Discretionary/Flex funds (\$226,265) will be used in support of the following activities:

- Technology
- Professional Development
- Enrichment for ALL students
- Field Trips
- Assemblies

Note: Up to 10% may be used at the Principal's discretion to encourage innovation or meet an immediate school need. In addition, from time to time, there may be cases where a Principal wants to use these funds for a purpose other than that listed above. In those cases, the Principal shall discuss his/her plans with the SCEF President, or delegate, prior to committing the funds.

According to Mila Milligan, Flex Funds and Fund-a-Need will be distributed as follows (*please note this is based on SCEF estimated grant, final total grant to be approved by SCEF board on 9/21/2015.*)

## Updated Numbers from Mila

2015-2016

FLEX FUNDS

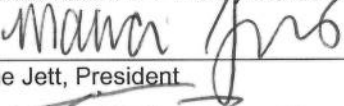
FUND-A-NEED

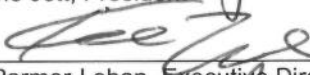
Arundel	37,711	18,688
Brittan Acres	29,968	14,851
Heather	31,115	15,419
White Oaks	27,387	13,572
CMS	50,401	24,974
<u>Tierra Linda</u>	<u>49,683</u>	<u>24,621</u>
TOTAL	226,265	112,125

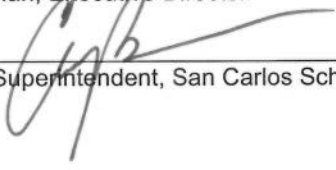
SCEF representatives will meet regularly with Superintendent Baker, PTA Presidents and with the principals of each school to facilitate open communication and discuss how these funds are being used at each campus.

The undersigned agree that this document reflects the understandings between SCEF and SCSD with regards to use of funds raised in FY15 by the SCSD and SCEF's fundraising plan for FY16.

Signed:

  
Marianne Jett, President

  
Kathy Parmer-Lohan, Executive Director

  
Dr. Craig Baker, Superintendent, San Carlos School District