



PACIFICA
EDUCATION FOUNDATION

Annual Report

Laying the groundwork for success.

June 30, 2009

The Pacifica Education Foundation Annual Report for 2008-2009 provides an overview of Foundation operations, finances and accomplishments during Fiscal Year ending June 30th, 2009.



Pacifica Education Foundation

Our Mission

The Pacifica Education Foundation (PEF) is a 501(c)(3) non-profit organization founded in 2008 by community volunteers committed to protecting and advancing quality education for the children of the Pacifica School District (PSD).

PEF seeks to raise funds for well-defined programs that fill essential educational gaps across our district schools. With the support of community members, parents, educators and local businesses, PEF raises and manages funds to supplement instruction and support core curriculum in Pacifica's elementary and middle schools.

Over time and with the success of our initial programs, PEF will extend its fund-raising to solicit grants from philanthropic institutions and corporations. Funds are used to promote education in Science, Technology, Math and selected enrichment and support programs. While completely independent of PSD, the Foundation maintains close communication with District and Parent/Teacher leadership at individual schools to align our efforts with the PSD Strategic Plan.

PEF's targeted financial support is one part of a larger, long-term solution needed to fund quality education in the Pacifica School District.



Letter from the President

Dear Friends and Neighbors,

In July of 2008, the Pacifica Education Foundation (PEF) submitted bylaws to the State of California¹ to establish a community-driven non-profit organization to support the Pacifica School District (PSD). While it is a difficult economic time to fund-raise and launch a new organization, we are making great progress due to the generosity and commitment of the citizens of Pacifica and their extended families. Our first annual report updates you on our progress during the period July 1, 2008 to June 30, 2009 in the following areas:

Leadership In the past twelve months, PEF's leadership has grown from its initial five members to a group of more than 20 active volunteers and Board Members, investing their time and energy to develop the organization, raise money and secure a future for PEF. To review the biographies of our Board Members, visit our website at www.pacificaef.org.

Strategy Development The PEF Board determined our first effort shall be focused on raising enough seed capital to launch a program and demonstrate PEF can drive innovative educational programs in support of PSD's core curriculum. With an initial success, we will follow our strategy to attract grants and donations from philanthropic organizations and corporate-giving programs in the Bay Area. To that end, our first program proposes to focus on development, teacher-training and support for the implementation of a classroom-based curriculum in 21st Century Learning Skills that is integrated into our children's daily instruction and school work.

Fund-Raising Our fund-raising approach is based on three strategies rolling out over time. We seek to engage everyone in our community in supporting our goals and to eventually reach outside Pacifica for aid from philanthropic institutions and corporate giving programs. The first fund-raising strategy, *the Patron Pledge Program*, began in the fall of 2008 and made great progress through this year in gaining the financial support of Founding Patrons. The second strategy, focused on Community Membership and Events, began in the spring of 2009. The third strategy, planned to secure grants and institutional donations, will be launched when we have proven our viability as a Foundation by successfully launching our first initiative, *21st Century Learning Skills*. Fall 2009 through Spring 2010 promises to be a critical time for continued Patron recruitment, Community membership growth and event participation to ensure funding to launch our first program Fall 2010.



Community Outreach While growing our base, developing the strategy and commencing fund-raising, PEF Volunteers also reached into our community—online and on foot. PEF’s website launched with information about PEF and online donation support while volunteers spread the word about PEF at the Farmer’s Market, PTO/PTA meetings, neighborhood house meetings and walks, and even on Facebook and YouTube!

With almost no capital outlay, PEF is off to a great start in large part due to the generosity of our Founding Patrons. Without their support and enthusiasm, we would not have ended this year with the momentum to make PEF a reality.

We believe we live in the kind of community that cares enough about the children and community of Pacifica to step up and make an educational foundation a priority—if you have not done so yet, join our effort and help make PEF programs a reality by becoming a Patron, Member, or volunteer and encouraging your friends and neighbors to support PEF too! Please let us know if we can provide any support to your outreach.

Thank you again for your support,

A handwritten signature in cursive script that reads "Jeanne Bellinger". The signature is written in black ink on a light-colored, slightly textured background.

Jeanne Bellinger, President
Pacifica Education Foundation

¹ The Pacifica Education Foundation was formed through the restructuring and transfer of control of the Pacifica Asset Management Foundation, an existing 501(c)(3), from the Pacifica School District to a group of community volunteers. The bylaws of PAMF were rewritten in compliance with Federal and State law to restructure the organization and form PEF as an independent, community-based organization. As a community organization, PEF is chartered to provide a source of locally-controlled funding to the public schools of Pacifica with initial focus on the PSD Elementary and Middle schools.

2008—2009: The Year in Review

Leadership from our community— Building the Board and Engaging Volunteers

The very first task in 2008 was to build a Board of Directors comprised of community and parent volunteers dedicated to sustaining and enhancing the educational experience of Pacifica's children. The Board consists of community residents and business owners without specific school affiliations, as well as parent representatives from Elementary and Middle Schools in PSD.

Our Board members are mature, responsible, dedicated Pacifica residents. Collectively, they bring a diverse and relevant set of business, educational, non-profit and Pacifica community experience to the organization. Their skills and talents drive Foundation activities such as Foundation governance and administration, strategic planning, program development, community outreach and education, and fund-raising. This year the Board set out Operating and Governance Principles that can be found at www.pacificaef.org

The Pacifica Education Foundation is an all volunteer organization. Many community members stepped up to work for our success. Volunteers could be found hosting informational meeting in their homes, creating brochures, planning and hosting fund-raising events and making a video.

To maintain clear communication and alignment between PEF and each school site and ensure we support and promote each PTO/PTA organization's interests in harmony with PEF, we've recruited an individual from each school to act as the School Liaison to PEF. School liaisons channel information to and from PEF and their school, allowing us to coordinate activities, avoid conflicts between school and PEF events, recruit PEF volunteers and provide PEF with another source of input and feedback from school sites. Please feel free to contact your PEF School liaison listed on our website (www.pacificaef.org) at anytime if you have questions about PEF and your school.

Developing a Strategy

The PEF Board approved 21st Century Learning as our initial program after soliciting input and reviewing a variety of options generated in meetings with PTO/PTA representatives from each school, members of PSD leadership and a wide range of parents, teachers and other community members. With

"Our children have so much potential. At PEF, we want to provide financial support to make sure they receive an education that will prepare them for lifelong learning and give them the foundation to pursue their dreams. With your support, we can make these programs real for our kids."

this program, PEF plans to partner with PSD to improve our children's education while providing a platform PEF can leverage to seek funding sources beyond the donations of Pacifica parents and community members, such as grants and corporate giving. Over the summer of 2008 PEF collected input to determine these basic criteria for funding:

- Support the Pacifica School District strategic plan
- Promote equitable education across district schools
- Align with PEF budget and funding constraints
- Encourage support from funding sources external to Pacifica

In addition, recommended programs are evaluated against the following criteria:

- Addresses a broad or acute educational gap
- Reaches a significant portion of student or faculty population
- Potential for significant impact in improving test scores or other assessments
- Promotes volunteer efforts across schools
- Encourages student engagement and love for learning

Programs may be single year or span multiple years provided the PEF Board approves the plan and commits to the fund-raising efforts necessary to sustain the program.

We selected 21st Century Learning Skills as our first initiative because today, information and technology drive everyday life like never before. To be prepared for their future careers, our students need to understand how to research, collect, process, analyze and present information. Yet, today there is no formal approach to staff technology development or usage in classroom learning in PSD. Our teachers, classroom aides and volunteers need support on using technology-based curriculum, the Internet, computers and software, as well as traditional research methods. This initiative meets all our basic and extended criteria and offers opportunities to integrate with future efforts in math, science, literacy and enrichment. Depending on the success of PEF fund-raising efforts, candidate programs include:

- Creating a District position to develop, deliver and maintain a consistent program and curriculum across schools to support faculty in developing our student's online learning and media skills, using computer software and the Internet for research, analysis and presentation, as well as provide support and training to school site library staff and volunteers
- Improved information technology equipment, training and support
- Expanded multimedia equipment and training for students & faculty

In addition PEF continues to administer the IBL Scholarship Fund and the Michele Garside Arts and Innovation fund which previously existed under the Pacifica Asset Management Foundation.

Fund Raising Approaches and Progress

Patron Pledge Program Patrons provide the cornerstone to PEF's fund-raising strategy by committing to donate \$1,000 or more when we reach a **minimum of \$200,000 in pledges**. This approach ensures PEF will have enough funds to launch a significant program with funding for the first two years. Patron's pledges will only be released to PSD when matched 50% or more by smaller donations from across the community. This approach ensures everyone is doing their part to support our schools and that our small donors have a big impact! As of June 30, 2008, we've secured **\$142,000 in pledges and donations from 73 Patrons**, comprised of individuals and families including PEF Board members and volunteers, small businesses, and organizations including all 6 School PTO-PTA organizations and the Parent Council. We will continue outreach activities, including an ongoing program of Patron Pledge Parties, until we reach our minimum goal of \$200,000—we're more than two thirds there!

Community Matching via Memberships and Events Ultimately, everyone in our community should support PEF! But, with so many demands on time and money, and so many worthy causes, getting broad support for a new organization requires a personal touch. To address this challenge, PEF is running an outreach program consisting of neighborhood House Meetings hosted by volunteers and Community fund-raising events. In February, we recruited over 50 individuals to hold House Meetings of about 10 people each throughout the spring and summer. Some of the guests at those House Meetings in turn agreed to host their own meeting, thereby spreading the word throughout our community. As we build a base of supporters, we will plan other events for the Fall to reach out and get support for PEF in the broader community. As of June 30th, 2009, our membership and event programs are beginning to bear fruit with \$13,680 raised, slightly over 25% of our minimum goal of \$50,000.

The success of our first seven month of fund-raising is gratifying but we recognize the next year will be pivotal in reaching our goals for this first program. With \$200,000 in Patron funding and \$50,000 in Community funding in early 2010, PEF can commit to a minimum of two years of support for the 21st Century Learning Skills initiative beginning in the fall of 2010.

Near-term Budget Crisis Mitigation vs. Long-term Leveraged Programs Alongside our nascent community outreach efforts in February of 2009, the impact of the financial market crisis hit Pacifica. A number of parents requested the opportunity to designate the funds they donated to be directed towards minimizing the impact of impending budget cuts instead of supporting the program for 21st Century Learning Skills. We've accommodated this request for community donations by allowing donors to specify whether they would like a percentage of their donation to be allocated to mitigating impending budget cuts.

2008-2009 Volunteer Leadership

Board Members

Lisa Bauer, Director

Sue Beckmeyer, Director

Jeanne Bellinger, President

Ling-Fong Chung, Director

Sheeraj Karulkar, Director

Darlene Mann, Vice President

Stephanie McAuliffe, Secretary

Andy Meiman, CFO and Treasurer

Carol Morales-Burnham, Director

Karen Sansot, Director

Caroline Totah, Director

School Liaisons

Cabrillo

Karen Dwyer-Meadow &
Paul Meadow

Ingrid B Lacy:

Darcie Newton

Ocean Shore:

Stephanie Hamilton

Ortega:

Carol Morales-Burnham

Sunset Ridge:

Susan Solstice

Vallemar:

Ami Hodge

Financials

Pacifica Education Foundation Income Statement July 1, 2008 - June 30, 2009

		Total
Income		
Non Profit Income		55,348.62
Total Income	\$	55,348.62
Expenses		
Bank Charges, Commissions & Fees		160.68
Dues & Subscriptions		75.00
IBL Scholarship Disbursement		759.86
Promotional		883.00
Stationery & Printing		2,412.32
Total Expenses	\$	4,290.86
Net Operating Income	\$	51,057.76
Other Income		
Interest Earned		943.25
Total Other Income	\$	943.25
Net Other Income	\$	943.25
Net Income	\$	52,001.01



Pacifica Education Foundation
Balance Sheet
 As of June 30, 2009

	Total
ASSETS	
Current Assets	
Bank Accounts	
First National Bank	19,304.09
Total Bank Accounts	\$ 19,304.09
Other Current Assets	
Schawb Brokerage	62,208.94
IBL Scholarship Fund	12,052.88
Michele Garside Art Fund	10,241.20
Total Schawb Brokerage	\$ 84,503.02
Undeposited Funds	7,623.00
Total Other Current Assets	\$ 92,126.02
Total Current Assets	\$ 111,430.11
TOTAL ASSETS	\$ 111,430.11
 LIABILITIES AND EQUITY	
Liabilities	
Total Liabilities	
Equity	
Opening Balance Equity	24,323.09
Retained Earnings	46,695.98
Net Income	40,411.04
Total Equity	\$ 111,430.11
TOTAL LIABILITIES AND EQUITY	\$ 111,430.11