



HSF Empowering Excellence

STRATEGIC PLAN

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I. INTRODUCTION AND OVERVIEW

The *Hillsborough Schools Foundation (HSF)* embarked upon a comprehensive update to its strategic plan to improve the foundation and guide its efforts.

HSF conducted a series of focus groups, interviews, online surveys and thoughtful community discussions that provided the basis for this strategic vision, which was adopted by the *HSF* Board of Directors on June 11, 2013.

Through this process, *HSF* recommitted itself to its mission and to serving as a model foundation where parents, community and partners work together to support excellence in public education.

Mission and Hallmarks of a Hillsborough Education

The mission of the *Hillsborough Schools Foundation* is to raise funds to support the tradition of excellence in education within the Hillsborough City School District (HCSD), while fostering volunteerism and community support for our public schools.

As one of the first private foundations for a public school district in California, *HSF* has always maintained a deep community commitment to a quality public education in our town. Through this commitment and the generosity of our community, *HSF* has been consistently contributing more than \$3 million a year to HCSD. Since its founding in 1980, the *Hillsborough Schools Foundation* has donated **over \$66 million** to our local school district, helping to maintain the high standards for which our public schools are known.

On an annual basis, *HSF* provides its funds through a block grant, allocated at the discretion of the publicly-elected school board and district leadership. At the time of this writing, *HSF*'s annual contribution was roughly equivalent to the financial commitment required to support 35 full-time (representing 1 in 5) teachers and staff in the district. More

than 200 *HSF* volunteers work each year to raise these funds and in collaboration with the Associated Parents' Group (APG) at each of the four school sites, ensure a high-quality and visionary education for the children we serve.

In particular, these resources have enabled the following hallmarks of a Hillsborough education:

- EXCEPTIONAL TEACHERS AND STAFF
- SMALLER CLASS SIZES & PERSONALIZED PROGRAMS
- EXCELLENCE IN MATH AND READING
- DEDICATED COUNSELORS
- WORLD-CLASS ENRICHMENT

Considering that HCSD had to cut more than \$3 million from the District budget between 2009 and 2012 due to reduced levels of state and government funding, *HSF* is as critical today as it has ever been to the success our public schools. We invite you to join us as an engaged community member, volunteer and donor in support of excellence in education, as we look to the future to ensure continued and critical support for our local public schools serving more than 1,000 students each year. This plan outlines the *HSF* vision to maintain that support and grow as a leader and model school foundation, providing an example of what is possible from public-private partnerships today and into the future.

Core Values

In doing our work, we strive to maintain our core values. We make it a priority to appreciate and thank our donors. We value and remain committed to being a collaborative partner that is open, communicative, and inclusive. In being an inclusive organization, we welcome and appreciate diversity in backgrounds, cultures, and perspectives. We value agility and desire to be a nimble and entrepreneurial organization, respectful of past experiences and organizational history, without reinventing the wheel every year. We value our volunteers and continue to invest in, cultivate, and acknowledge our high-performance volunteers. We engage volunteers with specialized professional expertise for effective volunteer engagement, goal achievement, and non-profit governance. We believe in building and investing in our professional staff, which supports our volunteer fundraising efforts and foundation objectives.

Guiding Principles

To achieve our strategic goals, we remain guided by our long-standing culture of community-based philanthropy and our guiding principles that include a deep commitment to:

- Our students — doing what's best for the whole child and all children in the district
- Our schools — supporting teachers, staff and the leaders who ensure educational excellence
- Our volunteers — the heart and soul of *HSF* who make our philanthropy possible
- Our donors — essential to our success
- Our community — it's why we are here and it's what we become together
- Our staff — the professional team in the office, which supports our volunteers and

ensures essential continuity from year to year

- Our traditions — continue to build, learn and deliver upon our mission
- Our spirit — "Together, we are all **HSF**!"
- Our future — prepare for the future in an ever-changing environment

II. GOALS AND OBJECTIVES

The **HSF** strategic vision includes three visionary goals:

1. Sustain and grow overall **HSF** donations and income
2. Focus **HSF** resources on those endeavors that provide the highest return on investments of time and money
3. Prepare for the future in a constantly changing environment

Goal #1 — Sustain and Grow Revenue

The overarching visionary goal for **HSF** is to sustain and grow our overall donations and income. We can achieve this by increasing overall foundation revenue, increasing the participation rate of parent and community donors, and using data to guide our goal setting.

To sustain and grow donations, we will:

- Achieve 100% participation in the annual giving campaign among all kindergarten, transitional kindergarten, and new families the year they enter the District;
- Increase overall contributions to **HSF** by stewarding, acknowledging and retaining all major donors giving at the ACE level and above, as well as continuing to expand Scholars' Circle participation; and
- Create the organizational structure to connect with and encourage philanthropic giving to **HSF** from the broader community (beyond current parents) with specific focus on transitioning current families to community donors as their children leave the district and welcoming new property owners as they move into town.

Goal #2 — Focus Resources on Highest ROI Endeavors

We can achieve our overarching goal by ensuring we focus our human and financial resources on those activities and endeavors that achieve the highest return on investments of time and money

To focus our human and financial resources, we will:

- Support, train and develop **HSF** volunteers, leaders and office staff to use best practices in fundraising to improve donor outreach, solicitations and acknowledgement;
- Review, rebalance and consolidate annual calendar of formal and informal **HSF** activities requiring volunteer, staff, and donor resources, including event sponsorships, underwriting, auctions, pay-to-plays, fundraising, communications and community partnerships;
- Prioritize events and activities that provide the greatest return on investments of time and money, build community, or advance us toward our visionary goals;

- Optimize office operations and staffing levels to align with strategic goals, support volunteers, focus on fundraising, ensure financial sustainability, and provide institutional continuity; and
- Continue to develop a systematic review and evaluation process for the executive director and staff in the Jan-March timeframe rather than yearend (May/June).

Goal #3 — Prepare for the Future

We recognize that **HSF** and our school district live in a world with an uncertain and changing future. The pace of change in publicly-supported education promises to accelerate further, and we want and need to be prepared for those changes.

To prepare ourselves for future success, we will:

- Define a clear, compelling, and visionary brand identity for **HSF** through effective, high-quality, cost-effective, consistent and proactive communications;
- Continue to examine and develop financial strategies that ensure sustained and consistent support of HCSD through the allocations process, professional management of **HSF** assets, and long-term financial planning;
- Grow the endowment fund and financial reserves to provide meaningful future funding streams, if and when needed. In the first year, work with the finance committee to develop growth targets in the endowment and financial reserves to provide materially meaningful future funding. In subsequent years, build the endowment and reserves to these new target levels;
- Explore with HCSD a mechanism for restricted foundation grants to support District initiatives, including those that develop from HCSD Forward;
- Monitor changes in the external environment that could impact school finances and public funding with particular attention to shifts in state and local funding. Respond, if deemed necessary by the **HSF** Board; and
- Create and track annual operating plans to ensure alignment with strategic vision.

III. IMPLEMENTATION

Tracking Progress

To achieve our strategic goals, engage our community and communicate effectively, the leaders and volunteers of **HSF** will:

- Create an annual operating plan to be approved by each incoming Board that sets clear and measureable objectives for Annual Giving, Events, Alliance Business Partners and other key areas of our organization in support of **HSF's** visionary and strategic goals:
 - June — Initiate planning at June board meeting, informed by outgoing board
 - July — Further develop and refine operating plan
 - August — President presents draft of annual operating plan draft to **HSF** Board
 - September — Adopt annual plan goals/objectives, including metrics for each area
- Track and report progress in individual areas of responsibility against the annual plan:
 - October-December — Board members report progress monthly

- January — Report on mid-year progress against plan and make midyear adjustments to achieve goals
- May — Board members submit year-end updates
- June — **HSF** President reports progress against the annual operating plan and overall strategic plan to incoming and outgoing Board members
- July — Summarize and communicate progress to broader **HSF** community through annual report, year-end summer letter and **HSF** webpage

Communications and Engagement

To be successful, leadership will devise and implement an annual communications strategy that:

- Engages our parent, educator and town community in the mission of the foundation;
- Clearly and memorably links the work of the foundation to the high quality of a Hillsborough public schools education
- Builds upon the most recent **HSF** positioning, while remaining relevant and fresh for key audiences and responsive to the current times;
- Presents a professional, well-crafted and cost-effective image; and
- Leverages and prioritizes a variety of communications for effective outreach, including the creation of an **HSF**-managed vehicle (e.g., electronic newsletter) to increase direct communication with **HSF** donors.