

# CHATHAM EDUCATION FOUNDATION STRATEGIC PLAN 2015-18

Three-Year Strategic Plan 2016-18

# **ABSTRACT**

Drawing from historical lessons and achievements, current realities, and future opportunities, leaders of Chatham Education Foundation have adopted a purposeful vision and strategic framework for impacting those it serves.

April Anthony
Armstrong McGuire

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### **Foundational Statements**

### Mission

To open doors to educational and personal growth for all students in Chatham County Schools (CCS)

### Vision

Maximize community investment in the CCS district to support the success of self-sustaining graduates committed to both life-long learning and our community.

### **Beliefs**

- Community investment builds stronger schools.
- Strong school districts willingly embrace change.
- Well-trained educators with access to continuing professional development lead students to stronger student achievement.
- Strong public education is the bedrock for a thriving local economy.

### **Core Values**

- Student achievement
- Teacher and training excellence
- Innovation and creativity
- Business and community partnerships
- Regional diversity

# **Executive Summary of Planning Process and Outcomes**

The Chatham Education Foundation (CEF) Board of Directors held a retreat in January, 2015 to lay the groundwork for a three-year strategic plan. Using organizational assessment data from an online survey, face-to-face and phone interviews with donors and community leaders, and Board feedback, CEF leaders came to an understanding of the organization's strengths and challenges. Some of the outcomes of the retreat included the creation of a Board Development committee of the Board of Directors and growth of the Development Committee of the Board of Directors.

A strategic planning committee of Board members and the public was created and met throughout the spring, and summer of 2015. Committee members included:

John Zaremba, Chair

Chris Ehrenfeld, Vice Chair

Stan Campbell, Board Member

Ben Birken, Treasurer

Justin Bartholomew, Board Member

Lee Bowman, Community Member

Subcommittees in line with board committees were created and met consistently. The following subcommittees were formed:

- 1. Development (Stan Campbell\*, Angela Milsaps, Chad Morgan, Jason Hartness)
- 2. Board Development (Chris Ehrenfeld\*, Ben Birken, John Pleasants, Jason Buchanan, Chris Blice)
- 3. Programs (Justin Bartholomew\*, Jody Cleven, Suzanne Morris, Jamie Cox)
- 4. Advocacy / Marketing (John Zaremba\*, John Williamson, David Hamm (ex-officio), Jason Hartness)

Jaime Detzi, Executive Director, attended all committee and subcommittee meetings.

## **Focus Groups**

Two focus groups were held June 23 and July 14, 2015 and targeted the following audiences respectively: Educators (June 23) and business, community leaders and government leaders (July 14). Key people who attended and gave input at focus group meetings were:

### Attendees:

7/14/15John ZarembaLinda ClarkeJaime DetziDon KnowlesKim MatsonJason DellApril Anthony

Marga Theelen

John Williamson

Jean Rittok 6/23/15

Lee BowmanJohn ZarembaCourtney CabeChris EhrenfeldLisa HolderJaime Detzi

Bill Terry Justin Bartholomew

Bill Harper Mark Hall
Alan Rosenfeld Bud Marchant
Don Stedman Amanda Hartness
Philip Culpepper Leslie Burwell
Ken Atkins Mitch Stensland
Jill Ehrenfeld Chris Poston
Jason Hartness Kaye Clark

Stan Campbell Angie Brady-Andrew

Suzanne Morris Larry Savage
Ben Birken April Anthony

An Executive Summary of the draft of the strategic plan was presented to the Chatham County Board of Commissioners, Chatham County School Board and Dr. Jordan, Superintendent, Chatham County Schools. Each provided guidance and input.

Justin Sudol

In general, the County Commissioners are very supportive of the Chatham Education Foundation and its mission. The Commissioners suggested that new board members should better reflect a more diverse CEF Board. In addition, they suggested partnerships with the NC School of Science and Math, the Boys and Girls Club of Siler City, as well as tactics to approach funders, such as the Oak Foundation. The meeting also established a renewed relationship with each of the Commissioners and potential collaborations in the future.

In addition, Superintendent Jordan discussed specific program priorities. He is very positive about the new direction and strategic plan.

A final draft was presented to the full CEF Board of Directors September 8, 2015 and was passed by a unanimous vote. The plan will be implemented and tracked from 2015-18. Board Subcommittee Chairs will ensure each priority within the strategic plan is implemented, and tracked and that goals are met.

# **Organizational Analysis**

100F DOD

Chatham Education Foundation (CEF) is a nonprofit organization that enriches student learning experiences and teacher effectiveness in Chatham County, North Carolina. Since 1993, CEF's Board of Directors and community volunteers and supporters have brought new learning experiences to public school students and their teachers with grant programs and partnership projects.

CEF was founded in 1993 by concerned parents, teachers and business leaders from across the county to encourage excellence in public education and to support the public schools. Early successes included the development of the Creative Teaching Grants which funded eighteen projects in 1993 with a total of \$6,500 and thirty-two projects in 1994 with a total of \$10,000. Staff Development Grants were also awarded in 1994 of \$3,750.

2001 DOD Com

Kim Caraganis Patti Goslen Don Johnson Susan Helmer George Gregger-Holt Anne Geer Dave Smith Joy Phillips Thelma Turner David Blackwell Louise Barnum Church Anderson  Betty Wilson Maria LaPetina Mort Barrow Bunkey Morgan Scott Moreland Scott Moreland Duane Porter Bunkey Morgan Bunk	<u>1995 BOD</u>	<u>2001 BOD</u>	<u>2001 BOD Cont.</u>
Uva Holland	Kim Caraganis Patti Goslen Susan Helmer George Gregger-Holt Anne Geer Dave Smith Joy Phillips Thelma Turner Tom Fisher David Blackwell Louise Barnum	Betty Wilson Don Johnson Mort Barrow Jo Ann Robb Ruth Leight Judy Morris Kaye Bryan Allison Crutchfield Larry Cheek Jonathan Daniel Mary Harris Perry Harrison	Alexander Graves Maria LaPetina Robert McKinley Bunkey Morgan Scott Moreland Duane Porter Efrain Ramirez Irving Rimer Dave Smith Carol Stamm Rob Tharp Thelma Turner Rev. Brian Thompson
Uva Holland Marco Zarate Tamsie Hughes	Church Anderson	Uva Holland	•

2001 BOD

Over the past twenty years some of CEF's accomplishments and programs included:

- National Board Certification Assistance (NBC): CEF offered opportunities to teachers who had earned their NBC status and assisted teachers applying for certification.
- Chatham County Public Education & Economic Development Summit: In 2000 Governor Jim Hunt was the keynote speaker attracting 1,000 attendees
- Committee of 100: Effort to increase awareness and support for quality public schools as well as influence reform
- PTA Officer's Dinner: Hosted to discuss concerns that affect all schools
- Parent Resource Center: Opened in 2000 and offered parents access to a complete K-12 textbook and resource library, parenting and academic skills courses, computer training and free internet access
- Public School Parent Issues Forum: Held countywide
- Candidate Forum: Held for School Board and County Commissioner positions
- Teacher Appreciation Drive: Donations raised in honor of a teacher(s)
- Intercede To Succeed: Awarded a grant for \$116,000 to fund early intervention reading specialists for at-risk students in 3 Chatham Schools a collaboration with CCS
- Literature Enhancement Project: A program to expanded the teacher's classroom reading training and resources
- Net Day: An effort to give internet access to call schools
- CPR: A Computer Recycling Program
- Project Graduation: A program providing safe options to celebrate graduation from high school

# **CEF Today**

Currently the Board of Directors has seventeen members. The by-laws allow for twenty-one members with a term of three years. The Executive Committee is comprised of the Board Chair, Vice Chair and Treasurer.

CEF is one of many educational foundations in the country. Currently the Executive Director is part-time and works 18 hours a week. One part-time administrative assistant and one part-time bookkeeper help with database entry, gift processing and day-to-day needs. This is the second strategic plan for the organization. An earlier strategic plan was written in 2000.

For the past 20 plus years, CEF awards Creative Teaching Grants and Professional Development Grants to teachers and professional staff in Chatham County public schools. Grants range from \$100 to \$1,500 and make a lasting impact on student achievement. Grants are made possible by donations from individuals, businesses, foundations, event net proceeds and workplace giving campaigns.

For the past three years the Governors Club Wine Society has hosted an event to increase awareness of CEF in this particular neighborhood. This event has increased the awareness of CEF in this particular neighborhood. In addition, CEF hosted its first Showcase of Schools event in 2015. The goals of this event included increasing brand awareness, showcasing Chatham County School's successes and raising funds from business sponsors.

The overall perception of the organization among internal and external stakeholders is positive. Through an organizational assessment conducted by Armstrong McGuire, the following strengths, weaknesses, opportunities and threats were determined:

## **Strengths**

Positive perception of organization

Board members committed to mission, share common desire to serve and improve lives of children

Executive Director is passionate, warm and gets things done

**Relationship with CCS** 

Core pillars of STEM, technology assistance and K-3 literacy

Ability to close education gaps

**Engages local community** 

Provides assistance to innovative teachers

# **Weaknesses**

Name recognition

No media outlet

Size of staff

No strategic plan/development plan

Incorrect data on CCS leads to assumptions

"Selling" CEF to larger base

**Events heavy** 

**Governors Club support heavy** 

Not many Board members from business community

**Proving impact of funding** 

# **Opportunities**

Create clear communiction and messaging

**Increase awareness** 

**Grow/Diversify Board** 

Create strategic plan

Ensure donors are aware of impact

Create endowment fund

Strenghthen annual campaign

**Collaboration with other non profits** 

**Grow staff** 

# **Threats**

**Awareness of impact** 

**Growing population** 

100 plus non profits in county

**Competition for funding** 

**East-West divide** 

Community resistance to change

**Private/Charter Schools** 

### **External Environment**

There are over 100 nonprofits in Chatham County and growing. Competition for volunteers and funding is increasing. There is no central media source. Chatham County is experiencing a high growth rate with an increasing population of public school-aged children. Parents and community leaders share concerns about how quickly the population is increasing with no written plan for types or locations of new schools.

The County is large and is divided into regions that are very different in wealth and diversity. PTAs, charter schools and private schools all compete for funding and for attendance. CEF's Executive Director maintains a close working relationship with the Superintendent of schools and his/her leadership team. The President (Dr. Bud Marchant) and the Chatham Provost of the Central Carolina Community College were in attendance during the first focus group and are committed to working with CEF moving forward.

Key stakeholders such as businesses and institutions of higher education are concerned about a future workforce to supply future economic development projects such as a mega park and auto manufacturer coming to Chatham County. Employers want to be able to provide future employees with a great public school system. Realtors need to be continually educated about educational opportunities and relay information to prospective new home owners with school aged children.

Chatham County Schools seems to be dealing with old statistics on school achievement and performance. Although CCS currently boasts great statistics, that are competitive with other districts, some of the community will not let go of a negative attitude towards the school system.

CEF does not have offices outside of a trailer that is mainly used as storage. Meetings are held in schools, board member conference rooms or at Chatham County Schools' offices. The organization does not have any programs except the teacher grants program. The strategic plan will serve as a tool to start new programs led by CEF in collaboration with other nonprofits and the school system. CEF would like to change its focus from a pass-through organization to a fully funded nonprofit working on literacy, technology, STEM, teacher professional development and advocate for educational issues faced by the county, state and nation.

# **Strategic Goals & Objectives**

The Strategic planning committee created the following four priorities and goals:

### **Increase Awareness**

Goal: To be the preeminent and recognized source of education support and resources in Chatham County

# **Increase Revenue**

Goal: Build a sustainable, diverse revenue stream in a proactive manner

# **Board Development**

Goal: Develop an active and engaged board whose members are diverse across geography, ethnicity and age, along with a leadership development component to cultivate a "waiting list" of potential new board members

### **Programs**

Goal: To offer well-funded, community supported programs that are implemented with fidelity in our schools. Programs will impact student achievement, develop teacher effectiveness and/or advocate for our students and teachers

# 2016 – 2018 Strategy Map

### VISION

Maximize community investment in the CCS district to support the success of self-sustaining graduates committed to both life-long learning and our community

### MISSION

To open doors to educational and personal growth for all students in Chatham County Schools

## **BELIEFS / CORE VALUES**

# **Beliefs:**

- Community investment builds stronger schools.
- Strong school districts willingly embrace change.
- Well-trained educators with access to continuing professional development lead students to stronger student achievement.
- Strong public education is the bedrock for a thriving local economy.

### **Core Values:**

- Student achievement
- Teacher and training excellence
- Innovation and creativity
- Business and community partnerships
- Regional diversity

### **STRATEGIC PRIORITIES**

Increase Awareness	Increase Revenue	Board Development	Program Development

**Performance Matrix** (All priority outcome measurement goals follow the calendar year except "Increase Revenue" which follows the fiscal year of September 1 to August 31.)

# **Priority: Increase Awareness**

Goal: To be the preeminent and recognized source of education support and resources in Chatham County

the Triangle and name becomes part of common language and well respected  2) CEF logo is widely recognized and mission is understood  3) Board members attend community  the Triangle and promotions plan  2) Send postcards to untapped communities continually  3) Executable Series and update monthly and after events  4) Future 5) Volum  The Triangle and promotions plan  2) Advoctors and series and update monthly and after events  5) Volume 5) Volume 5) Volume 6) Create online calendar of events for board admining attendance 2) Consumer 3)	members 1) Increase social media following by 25%
ambassadors  4) Organization known as an advocate for and PTA meetings (2 issues in year 2 and 1 additional issue in year 3)  CCS, teachers and public education  5) Increased attendance at annual "Showcase of and advocate for and PTA meetings (2 issues in year 2 and 1 additional issue in year 3)  8) Increase email campaigns beyond monthly eNewsletter to 6/year (8/year in year 2 and 12/year in year 3)  9) Begin search for Alumni organization from the three County high schools  3) Increase Direct (1) Revents the public education and 1 additional issue in year 3)  1) Revents the public education are public education and 1 additional issue in year 3)  1) Revents the public education are public education and 1 additional issue in year 3)  1) Revents the public education are public education and 1 additional issue in year 3)  1) Revents the public education are public education and 1 additional issue in year 3)  1) Revents the public education are public education ar	ive Director  Marketing Staff eers  Needed  2) Increase social media engagement with more comments and conversation tracked by hits  3) Increase website traffic by 10% (# of visitors)

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Increase Awareness Year Two Tactics include: creating and distributing donor/teacher videos, contacted all area fire departments to hold State of Schools, implement a Hall of Fame banquet to enlist alumni support as well as back to school and teacher appreciation billboards and ads.

### Increase Awareness Year Two Outcome Measures include:

- 1) Increase social media following by 25% (followers, tweets, reached) of previous year
- 2) CEF has increased print/TV media viewings (clips)
- 3) Increase website traffic by 10% (visits)
- 4) Increase email distribution list by 25%
- 5) Increase print/TV/video articles to 6/year (in addition to Chatham Record)
- 6) CEF board members attended one community/school event per month
- 7) At least three CEF programs are recognized in the community (survey)
- 8) Attendance for the "Showcase of Schools" event is up by 25% (number of attendees)

### Increase Awareness Year Three Outcomes Measures include:

- 1) Increase social media following by 25% (followers, tweets, retweets) from previous year
- 2) Increase print/TV media viewings (clips)
- 3) Increase website traffic by 10% (visitors)
- 4) Increase email list by 25%
- 5) Increase print/TV/video articles to 7/year (in addition to Chatham Record)
- 6) CEF board members attend one community/school event per month
- 7) CEF advocating in Chatham County or Region for more than one "hot topics"
- 8) Increase awareness of CEF by schools (survey)
- 9) At least five CEF programs are recognized in the community (survey)
- 10) Attendance for "Showcase of Schools" increased by 25%

# **Priority: Increase Revenue**

Goal: Build a sustainable, diverse revenue stream in a proactive manner

Success Strategies	Tactics	Responsibility of	Outcome Measures
1) Raise \$60,000 in	1) Continue to increase individual prospect list	1) Board members	1) Number of new donors
unrestricted	(Governors Club, Briar Chapel, Preserve, Siler	2) Development	2) Number of renewal donors
revenue(\$80K in	City and Chapel Ridge, Old Chatham Club, AVID	Committee	3) Dollars raised (unrestricted and
year 2, \$100K in year	list, Morehead scholars)	3) Executive Director	restricted)
3)	2) Develop direct mail timeline for annual appeal	(increased hours in	4) Number of "Sustainer" monthly donors
2) Make 20 cultivation	and implement fall 2015	year 2 and full-time in	5) Number of solicitations made
visits to donors with	3) Board develops list of potential	year 3)	6) Number of proposals funded vs. not
capacity of \$250 or	donors/prospects to consider face-to-face	4) (Development staff	funded
more (40 in year 2,	meetings (125 in year 1, 150 in year 2 and in	hired in year 2)	7) Number of face-to-face solicitation and
60 in year 3)	year 3)		cultivation meetings
3) Increase renewal	4) Begin developing alumni relationship and	Resources Needed	8) Number of new business partners (year
donors to 70% (75%	research	1) Increased	2)
in year 2, 80% in	5) Build/implement donor engagement planning	administrative support	9) Number of individual donors growing
year 3)	6) Clearly defined and marketed set of programs in	2) Increased fundraising	from donor to major donor to sustainer
4) Secure funding to	which to raise funds	budget for direct mail	to planned giving prospect/donor (year 3)
support 1 to 3 new	7) Increase email/social media fundraising	and online tool for	
programs in year 1	8) Consider a membership model	monthly giving	
(1 to 3 in year 2 and	9) Update list of local/triangle corporations as	program	
5 or more in year 3)	potential partners	3) Board solicitation	
5) Create monthly	10) Update business partnership plan –	training (major donor	
payroll deduction or	11) Research/plan Hall of Fame event (host in year	and planned giving	
credit card donation	2 and 3)	concentration in year	
opportunity (grow	12) Research and plan a new event for 2016 unless	2)	
program in year 2	we will rely on the Derby and/or Showcase of		
and year 3)	Schools event as our source of income for 2016		
6) Generate \$10,000	planning purposes.		
from business	13) By Program, identify potential donors including		
partners program	time frame, donor details		
(\$15K in year 2 and	14) Research implementation and financial		
\$25K in year 3)	requirement for Planned Giving Program		
7) "Showcase of	15) Invite speaker to CEF board meetings to discuss		

	Schools" event	options for Planned Giving
	generates \$10,000 in	16) Continue to move donors through pipeline from
	year 1 as an annual	annual donor - sustainer - major donor -
	culmination to the	planned donor
	Business Partners	17) Identify potential government grants consistent
	Program	with program needs
8	B) Revenue	18) (Research crowdfunding in year 2 and test in
	diversification	year3)
	percentage gap	19) Showcase of Schools event raising \$10,000 in
	closing by 3% (3% in	Business Partner Revenue as a culmination of
	year 2 and 5% in	annually partnership opportunities in year 1.
	year 3)	
9	9) Generate \$5,000 in	
	revenue from events	
	in year 2 and \$15K in	
	year 3	
1	LO) Create Planned	
	Giving program in	
	year 3	

# **Priority: Board Development**

Goal: Develop an active and engaged board whose members are diverse across geography, ethnicity and age, along with a leadership development component to cultivate a "waiting list" of potential new board members

Success Strategies	Tactics	Responsibility of	Outcome Measures
1) Active and engaged	Create strong nominating and terminating	Board members	By-laws updated
board of 21	committee	2) Nominating	2) Recruited and graduated one third of
community leaders	2) Update by-laws allowing for two consecutive	Committee/Board	board members annually
2) Regular attendance	three-year terms	Development	3) All board members participated in
and participation at	3) Create board term and class matrix	Committee	annual board campaign
board meetings	4) Create board recruitment process	3) Executive Director	4) Regular meetings and self-sustaining
3) Maintain 100%	5) Clarify and document roles and responsibilities	4) Outside counsel	committee meetings held
board financial	of board members and board committees	5) Networking through	5) Board adhered to strategic plan with
participation	6) Verify/recruit committee chairs and members	PTA	regular check ins at each board meeting
4) Board members feel	annually		6) Every Board member feels comfortable
comfortable and are	7) Hold annual/biannual new board member	Resources Needed	fundraising and is a brand ambassador
active with	orientation	1) Consultant for annual	7) Advisory Council met twice
fundraising efforts	8) Provide board member fundraising training	fundraising training	
5) Board committees	annually	2) Increased staff hours	
meet regularly with	9) Create Advisory Council with defined job		
defined goals and	description (meets biannually)		
actions			
6) Strong nominating			
and terminating			
committee in place			
and working			
7) Add Strategic plan			
check in to every			
board meeting			
agenda			
8) Create Advisory			
Council (6-10			
members)			
9) Board Members are			
confident brand			

ambassadors for CEF		

# **Priority: Program Development**

Goal: To offer well-funded, community supported programs that are implemented with fidelity in our schools. Programs will impact student achievement, develop teacher effectiveness and advocate for CCS students and teachers

Success Strategies	Tactics	Responsibility of	Outcome Measures
<ol> <li>Grow Teacher Grants program by number of grants given out and increased size of grants</li> <li>Create and</li> </ol>	1) Implement five of the following programs:  a. Read to Succeed. Literacy related projects that will include at a minimum CEF participation in Chatham Reads. Other options: Literacy Summit, summer reading programs, expanded partnership with the	<ol> <li>Board members</li> <li>Executive Director</li> <li>Future program staff</li> <li>Volunteers</li> </ol>	<ol> <li>All programs will have defined, measureable goals and be tracked for impact</li> <li>Dollar value of teacher grants awarded</li> <li>Number of students reached via teacher grants</li> </ol>
implement five key programs over the next three years to address student achievement, teacher effectiveness and advocacy (1 new program in year 1, 2 additional new programs in year 2 and two additional programs in year 3)  3) Establish Chatham Education Council (CEC)  4) PTA President Collaborative	Hill Center, and Fit, Fun, Literacy - After school programs that target fitness and literacy.  b. STEM Academy: Offer national programs to schools/district that include after school STEM opportunities, summer camps, science kits, field trips, in school opportunities such as STEM mobile bus and mobile planetarium.  c. Teachers Learn Tech: Supporting the increase of teacher implementation of technology in the classroom  d. Financial Literacy Program: Sponsor learning initiatives in CCS that promote personal finance/collaborate with a bank  e. Growing Our Way: Mentoring program targeting most at-risk students (will coordinate trained tutors or partner with AmeriCorps programs)  f. Leadership Institute: Select principals and teachers will attend annual / bi-annual events with nationally known practitioners, scholars and business experts.	Resources Needed:  1) Funding for each program 2) Tracking of program revenue if appropriate 3) Program staff 4) Volunteers 5) Board or community lead for each program	4) Read to Succeed Measures:  a. Number of students reading at grade level  b. Number of books read  c. Number of volunteer mentors  d. Attendance at Literacy Summit  5) STEM Academy Measures:  a. Number of students attendees in afterschool offering  b. Number of students/girl campers  c. Number of participants at STEM mobile bus  d. Number of students taking STEM courses in middle and high school  6) Teachers Learn Tech Measures:  a. Teacher survey  b. Number of teachers attending orientation  7) Financial Literacy Measures:  a. Number of students taking sponsored lesson as part of class time  b. Pre and post assessment  8) Growing Our Way Measures:

2) Chatham Education Council (Year 1): a. Number of trained tuto	ors
a. Create mission/purpose b. Hours of tutoring time	
b. Create potential member roster, recruit c. Number of students	
and hold initial meeting February, 2016 d. Increased end of year	test scores
3) PTA President Collaborative (Year 1 or 2): e. Pre and post student s	survey
Convene PTA Presidents for an annual or bi-  9) Chatham Education Council	
annual meeting a. Membership and atter	ndance and
a. Discuss educational best practices participation in Chatha	am Education
b. Discuss school/county education needs Council meetings	
c. Brainstorm and implement solution b. Council identifies 2-3 h	not button
d. Leadership development training issues to tackle	
e. Coordinate in community projects c. Council finds solution a	and moves
towards a successful o	utcome on
at least one main educ	cation issue
faced in Chatham Cour	nty
10) PTA President Collaborative	
a. Attendance and partic	•
PTA Presidents' meeting	_
b. Addressing common p	
c. Provide constructive co	
feedback to the Distric	
students, parents and,	or teachers