

# CAF Strategic Plan 2023-2028

Presentation to CAF Board  
May 2023



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# Introduction

- Founded in 2007, the **Carlmont Academic Foundation (CAF)** is a volunteer-led fundraising organization that helps bridge the gap between what is provided by state and local funding, and what our students need to be ready in the classroom and ready for life. Initially, CAF provided support for ‘classroom supplies,’ which over time has grown to an over \$1 million annual commitment to Carlmont to maintain small class sizes, provide innovative classes, support our teachers and prepare students for college and career.
- **CAF’s Mission** is to work with parents, local businesses and community members to raise funds to support Carlmont High School and enrich the educational environment for all students beyond what is possible with public dollars by funding flexible, innovative and inclusive educational programs that will have broad based, substantial and lasting impact.
- In Spring 2023, **CAF embarked on a Strategic Planning process** to develop its strategies for the next five years (2028), including its interim goals and tactical plans. The Strategic Planning process was done over a two-month period and involved fifteen dedicated volunteers working in small groups and as an integrated team to determine CAF’s strengths, weaknesses, opportunities and threats as inputs to develop the strategic plan that included key benefits, stakeholder messaging, quantifiable goals and one-year action plans.
- This presentation is a part of the results of that Strategic Planning process.

# CAF Five-Year “2028” Vision

CAF CARLMONT  
ACADEMIC  
FOUNDATION

## 2028 Strategic Plan

### Key Milestones

**\$1.2MM Raised**  
**33% Participation**  
**\$75k Business Donors**

Year 1 2024

**Executive Director Hired**  
**CAF Endowment Growing**

Year 2 2025

**\$1.5MM Raised**  
**40% Participation**  
**\$300k Business Donors**

Year 3 2026

**+65% Business  
Donor Retention**

Year 4 2027

**\$1.75MM Raised**  
**45% Participation**  
**\$1MM Endowment**

Year 5 2028

# Why CAF's Vision Makes Us Excited

## EXCITEMENT FOR CAF's 5-YEAR VISION

CAF has maintained and expanded class choices.

CAF, as an organization, has been built to last.

Our community can depend on CAF.

CAF has a strong foundation from which new volunteers can build.

CAF has a strong relationship with our business community that takes some pressure off parent donations.

CAF makes a tangible benefit in the education experience of our kids. CAF is doing things that really matter.

CAF has great committed volunteers and leaders that make people want to donate and join the CAF board.

CAF provides consistency to Carlmont to provide a sense of identity that helps attract the best talent.

CAF provides opportunity for connections with strong role models.

CAF has passionate, dedicated volunteers.

There is comfort knowing that CAF can provide mental health and wellness support for our students when they need it.

Parents can donate, contribute and be part of the solution for their kids.

CAF invests in programs - such as BTI - that provide long-term education paths into specialized fields.

CAF can communicate our values, vision and mission.

CAF can communicate our differentiation as to why public school education is so valuable.

# CAF Quantifiable Goals

CAF Quantifiable Goal	Today (2023)	One Year (2024)	Three Years (2026)	Five Year Vision (2028)
<b>Total Funds Raised by CAF</b>	\$1,100,000	\$1,200,000	\$1,500,000	\$1,750,000
<b>Percent of Funding Goal Reached by December</b>	45-50%	55%	65%	70%
<b>CAF Participation Rate</b>	30%	33%	40%	45%
<b>CAF Ask Amount</b>	\$1,200	\$1,500	\$1,750	\$1,900
<b>Business Funding Goal (non-matching)</b>	\$40,000	\$75,000	\$100,000	\$200,000
<b>Business Funding as Percentage of Total Funds Raised</b>	5%	6%	20%	25%
<b>Business Donor Retention Rate</b>	50%	50%	65%	75%
<b>Percent of New Developments that Donate to CAF</b>	<10%	25%	50%	75%
<b>CAF Endowment Established and Endowment Value Growing</b>	\$650,000	\$695,500	\$796,278	\$1,000,000

Assumptions on what the economy will look like:

- No "recession" in 2023-24
- Inflation remains around 5% (and by extension, Carlmont salary costs)



# Summary of Benefits to CAF Stakeholder Groups

## Summary Benefits and Messaging at Five Year Vision for Each Stakeholder Group

	Students	Parents	Teachers/Staff	Businesses
	<p>CAF gives me a greater choice of classes with fewer students per class.</p> <p>CAF helps make Carlmont a reputable school that is highly ranked allowing me the best future opportunities.</p> <p>CAF helps fund access to counselors, tutoring, college essay support, college &amp; career advice, and mental health services.</p> <p>Carlmont students understand the value of CAF and can talk to their parents about the vision and benefits of CAF.</p>	<p>CAF supports Carlmont to provide the best education and gives comfort to all parents that their kids are getting a great education.</p> <p>CAF supports all students to achieve their best.</p> <p>CAF frees up budget for other important priorities allowing greater choices, resources and opportunities.</p> <p>CAF helps educate parents, especially out-of-state/country parents, about the California education system.</p> <p>CAF supports college and career readiness to help navigate the very complex and confusing college application process.</p> <p>CAF supports mental health services for all kids.</p>	<p>CAF provides support, consistency and stability.</p> <p>CAF provides resources not only to do the job but to try new innovative things.</p> <p>CAF and the parent/business community show their commitment to teachers &amp; staff.</p> <p>CAF creates opportunities to get specialized assistance to allow the teachers in the classrooms to focus on their core objectives and curriculum.</p> <p>CAF creates additional opportunities for service and cross-departmental collaboration opportunities.</p> <p>CAF makes Carlmont sought after for the best teachers, staff and educators.</p>	<p>CAF gives businesses a tangible path to be an active member of the community in which they operate.</p> <p>Support of CAF helps Carlmont educate a future highly educated workforce and provides interns for summer work.</p> <p>CAF helps business establish goodwill for their business in the community.</p> <p>CAF helps ensure high quality schools for their employees.</p> <p>CAF helps keep our community strong and real estate value high.</p> <p>CAF is a trusted and efficient non-profit that businesses should have confidence investing in.</p>

# Action Plan 1: CAF Funding Amount

Strategic Category	CAF Funding Amount
Strategic Vision at Five Years	CAF annual amount fundraised increases to \$1,750,000
One-Year Goals	CAF annual amount fundraised increases to \$1,200,000
Overall Benefit	Provide a stable source of funding that Carlmont administration and the Carlmont community can count on to advance their education goals.

## Action Plan to Achieve One Year Goals

Action Items	Owner	Due Date	Dependencies
Increase the basic ask to \$1,500 and Leadership Circle to \$3,700 for '23-'24	President	complete	board approval
Revisit basic ask amount annually (consider increasing by 5% if inflation continues)	President	3/20/24	board approval
Work to move time frame for ask to Fall	CAF	ongoing	
Establish major donor team to specifically focus on large donors	Nominating committee	8/1/23	nominating committee
Outreach to incoming 9th grade families	Operations & marketing	6/1/23	CHS data team
Bagpiper Bash and Other Fall events (9th grade welcome, BTSN)	VP Campus & Community	10/1/23	CHS admin
Continue to solicit business sponsorships	VP business outreach	ongoing	growing outreach team
Migrate CRM (Customer relations management - data base)	President & operations	3/1/24	



# Action Plan 2: CAF Funding Timeline

Strategic Category	CAF Funding Timeline
Strategic Vision at Five Years	70% of CAF fundraising goal met by December of each Fundraising Year
One-Year Goals	CAF represented in registration flow; marketing begins at beginning of school year; 55% of funds come in by end of December.
Overall Benefit	Carlmont administration will have more visibility into next year's funding at start of the staff hiring season; CAF team gets fundraising done sooner and can focus on cultivating relationships.

## Action Plan to Achieve One Year Goals

Action Items	Owner	Due Date	Dependencies
Represent CAF in registration flow	President	Complete	District cooperation and system capabilities Registration flow happens at end of CAF fiscal year!
Represent CAF in online update	President	5/1/23	We will be in during 2023, but at end of process
Kick off Welcome series at beginning of school year	VP Marketing	8/16/23	Volunteer availability during summer
Launch community events in fall: Bagpiper Bash in September, 9th grade event, BTSN, evaluate taco truck	VP Campus & Community	6/1/23	
Improve 8th grade outreach	VP Marketing	5/1/2023	Getting information from online update at beginning of May

## Deliverables / Output

# Action Plan 3: CAF Donor Participation Rate

Strategic Category	CAF Donor Participation Rate
Strategic Vision at Five Years	CAF Donor Participation Rate - at 45% - is ahead of our peer Education Foundations
One-Year Goals	33% (an increase of 3% from today).
Overall Benefit	The more people who are engaged and donating, the more money we'll raise. Takes away the burden from all donors.

## Action Plan to Achieve One Year Goals

Action Items	Owner	Due Date	Dependencies
Communicate the annual ask as a daily amount that can be more easily digested by donors (perhaps an infographic of monthly Netflix fee equates to what your kid gets for their education if you donate the same amount)	Marketing	Ongoing	No dependencies, except available team bandwidth
Remind high school parents how much they were donating to middle/elementary schools	Marketing		
Increase number of recurring monthly donations - perhaps do specific fundraising. drive early in the year focused on setting up recurring monthly donations	Marketing		
Implement better donation processes based on donor lists.	Ops		CRM and segmentation tools
Increase outreach to parents including videos and testimonials of parents.	Marketing		
Create physical banners, yard signs to advertise CAF	Marketing		
Run campaign targeted at non-donors communicating that they can start with a lower donation amount. Perhaps target with Reading Power-like initiative	Marketing		

## Deliverables / Output

# Action Plan 4: CAF Executive Director

Strategic Category	Hiring of Executive Director
Strategic Vision at Five Years	Executive Director is hired, bringing enough value to pay for themselves and helping to grow CAF.
One-Year Goals	Have ED on board by 6/24, or have a plan to hire in fiscal year '24-'25
Overall Benefit	A dedicated resource is available to proactively reach out to donors, build relationships, and keep campaigns on track to make fundraising activities more predictable from year to year.

## Action Plan to Achieve One Year Goals

Action Items	Owner	Due Date	Dependencies
Initiate talent search	President	6/24	
Create a job description	President	completed	
Establish budget with priorities identified	President	8/23	

Deliverables / Output	Executive Director
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# Action Plan 5: CAF Data Quality & Early Visibility

Strategic Category	Data Quality & Early Visibility into Fundraising Needs
Strategic Vision at Five Years	CAF leadership operates on data and has early visibility into fundraising needs and potential gaps
One-Year Goals	New donor management system live with functional reporting
Overall Benefit	Everyone on the leadership team can see where we are and act sooner to address issues. Volunteers spend much less time on custom data pulls and custom reporting.

## Action Plan to Achieve One Year Goals

Action Items	Owner	Due Date	Dependencies
Select new donor management system	President + Operations	6/1/23	
Implement new system	Operations/ special team	3/1/24	Current license doesn't expire until 3/2024
Set up new reporting	Operations	4/15/24	

Deliverables / Output	
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# Action Plan 6: CAF Business Donors

<b>Strategic Category</b>	<b>Business Donors</b>
<b>Strategic Vision at Five Years</b>	Business Donors as significant and recurring source of CAF funding
<b>One-Year Goals</b>	Biz funding as % of total funds raised
<b>Overall Benefit</b>	Take the burden off families and grow fundraising without increasing the recommended ask to families Secures sizable donations, which helps with forward planning Reduces stress and workload on CAF volunteers

## Action Plan to Achieve One Year Goals

Action Items	Owner	Due Date	Dependencies
Proactively be ahead of developers to be included in their community dev plans that get presented to city council	Business outreach		Number of approved developments in the Belmont, RWS, SC cities
Create a business outreach committee to reach out to more local biz sponsors. Get San Carlos and RWS volunteers who have local biz connections.	Business outreach		Recruit volunteers outside of core Belmont area
Create marketing materials focused on biz sponsors: collateral, drip (email nurture) campaign	Business outreach & marketing		
CAF continues to participate in the Chamber	Business outreach		
For existing donors: Communicate to businesses the benefit of being a recurring donor (set it and forget it and reap the marketing benefits). Upsell them to become recurring donors - from Bronze to Silver, etc - donor tiers  For first-time donors: Focus on the value of donating	Business outreach & marketing		

## Deliverables / Output

# Action Plan 7: CAF Endowment

Strategic Category	Endowment Established
Strategic Vision at Five Years	CAF Endowment established in 2024 and grows to \$1MM by 2028.
One-Year Goals	\$695,000
Overall Benefit	With an endowment in place to provide stable funding from year to year, Carlmont High School administration will be able to plan more effectively. CAF volunteers will face less fundraising pressure in years when the local economy is not doing well.

## Action Plan to Achieve One Year Goals

Action Items	Owner	Due Date	Dependencies
Message to graduating families	Marketing	Done	
Message to Alumni	Marketing	TBD	
Messages to business groups/target developers	Business outreach	TBD	

Deliverables / Output
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# Messaging to Each Stakeholder Group

	Students	Parents	Teachers/Staff	Businesses
<b>How CAF will Message Each Stakeholder Group</b>	<p>Student to Student is the best way to message. CAF "Thank-A-Thon" Competition to create a Tik-Tok or drama or IG or some other marketing. Ask kids to come up with a marketing approach to market to their peers. Do a short-film about "With CAF and without CAF".</p>	<p>Push kid messaging and push to parents. All other normal messaging channels, but need to find a way to make our message come to the top.</p>	<p>Important to remind teachers of all the support that CAF provides. There are a set of talking points for how CAF supports Carlmont that can be used in recruiting and attraction of talent.</p>	<p>Need CAF marketing pitch materials for businesses. Help businesses prioritize CAF donations as a marketing expense as much as a charitable donation.</p>



# Conclusion

- The CAF Five-Year Strategic Plan (2028) was developed by a team of dedicated volunteers, but the success of the strategic plan depends on everyone: parents – teachers/staff – businesses – students.
- The CAF Strategic Plan is meant to be a set of guidelines that can be improved upon as CAF and Carlmont meet the challenges and opportunities of the next five years.
- CAF is always looking for new ideas and volunteers who can help CAF implement and improve upon this plan.
- CAF appreciates the strong support of our parents, business donors, teachers/staff, and of course, the students we support.
- Thank you!

CAF STRATEGIC PLAN 2023-2028

# APPENDIX

# CAF Strategic Planning Process Overview

## I. Kickoff

### Scoping & Planning

- Kick-off & Logistics
- Scoping & Prioritization
- Team Structure
- Approach & Timeline
- Work on SWOT

## II. Brainstorming in Working Groups

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

## III. Analysis, Research & Benchmarking

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

## IV. Board Check-point and Feedback

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

## V. Drafting of Integrated Strategic Plan

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

## VI. Final Reviews, Edits and Publishing: Strategic Plan

- Publish Draft
- Board Feedback
- Publish Final

# CAF SWOT:

## Strengths, Weaknesses, Opportunities & Threats

### Strengths

- Team: Committed CAF Board & Volunteers
- Affluent & Educated Parents, Community & Businesses
- CAF Solid Performance & Consistent Growth
- Scope and Impact of Benefits: All Students Benefit / Fund Variety of Initiatives
- Strong Working Relationship with Carlmont Administration
- Dedicated Teachers & Staff, Great School Campus
- CAF Great Culture & Openness to Change / Try New Things
- Creation of Endowment

### Weaknesses

- CAF Board & Volunteer Turnover & Fatigue, Challenges to Recruit New
- Challenges to Communicate CAF Goals, Needs, Achievements, Differentiation
- Challenges to Increase Corporate & Business Support of CAF
- Problems with Data, Emails, Document Storage, Communication Channels
- Inconsistent CAF & Donation Timelines
- Donors Don't Understand Why CAF is Needed
- Competition For Same Donor Dollars & Donor Attention
- CAF Dependent on Bay Area Economy (Feast & Famine)
- Difficulties Onboarding New Volunteers

### Opportunities

- Increase Corporate Support
- Increase Parent Participation, Especially Incoming Parents
- Improve CAF Brand Awareness & Website
- Improve Communications of CAF Results & Impacts
- Improve Donor Outreach, Survey and Alignment
- Improve CAF Governance, Strategic Planning, & Reporting
- Improve Donor Transitions from SCEF and School Force to CAF
- Improve Volunteer Onboarding & Integration Across Organizations
- Grow Endowment
- Hire Executive Director
- Funding Less But With Larger Impacts
- Measure W funding
- Partner with Other Carlmont Organizations

### Threats

- Competition for Dollars, Resources, Donor Attention
- Economic Changes, Job Market
- Parents Don't Think CAF Needs Money
- Cost of College
- Salsa Transition

# CAF Strategic Planning Teams

## Team 1: CAF's Purpose

- Ulla Foehr
- Gay Buckland-Murray
- Grete Fry
- Julia Williams
- Tim Hoffman

## Team 2: External Groups

- Sandra Sanvido
- Linda Leung
- Lisa Bock
- Marian Wells
- Nivedita Sahasrabudhe
- Tim Hoffman

## Team 3: Operations & Tactics

- Linda Sonne-Harrison
- Clarissa Naftzger
- Marjan Mossadeghian
- Tiffany Booth
- Tim Hoffman

# Strategic Vision: Ranking and Detail

Strategic Vision Name (short-text)	STRATEGY CATEGORY	FINAL RANK	Five Year Strategic Vision Description (long-text description)	Quantifiable Goal at Five Years	Source	STUDENTS	PARENTS	TEACHERS / STAFF
Foundation will increase funding to xxx.	CAF Funding Amount	1	Increased funding will provide for additional sections, wellness supports and potentially more services in the college and career center.	We will raise xxx dollars.	Team 1	more elective/course options - enhanced program availability - decreased class sizes - increased wellness supports - enhanced college & career services - academic tutoring opportunities - academic counseling	Increased confidence in the quality of the Carlmont HS experience (see items in B32) Greater responsibility/investment (both in number of donors and the average donation)	More support (examples: staffing, retention, mini grants, PD/supplies), sense of community investment,
CAF annual amount fundraised increases \$1,750,000 (x% increase) Getting to \$1.3M will only address inflation!			We need to discuss with other working groups: Are we trying to do more, do the same and cover inflation?	Total amount fundraised is \$1,750,000 Average donation of \$K/ up by 50% Leadership Circle up \$x/ by 50%	Team 3			
Successful foundations meet their fundraising goal by December	CAF Funding Timing	2	By shifting our ask period to August - November, and during registration ask for pledges and recurring donations, we will meet our goal by the end of the calendar year.	We will meet our fundraising goals by the end of the calendar year.	Team 1	quality teachers	Aug - Dec becomes a financial push, Jan - Jun becomes positive advertising and promotion, return to having events	Sense of stability/reliability/job security (?) - Admin increased ability to plan
Fundraising happens early in school year, so Carlmont administration has plenty of visibility into funding			Carlmont counts on CAF funding to plan for the next school year, and the administration needs to be ready in March. Most of CAF's funding goes to salaries, and the hiring season begins in March. Other education foundations in the area fundraise at the beginning of the school year, which makes transitions easier. If we get the "heavy lifting" out of the way at the beginning of the year, we can spend more time on increasing brand awareness, finding volunteers, and thanking our key donors through events like Leadership Circle or even a gala.	<ul style="list-style-type: none"> <li>30% of funds come in registration flow (try to get School Force metric)</li> <li>60% of funds come in before the end of the calendar year</li> </ul>	Team 3	"When we see the thermometer close to our goal near the beginning of the year, it's inspiring. I know that my community cares about me, and I know my teachers and principal have confidence we will meet that goal."	"Donating during registration is such a breeze and I know my contribution helps our high school budget and allocate resources in a strategic way."	Teachers and staff will feel confident their programs will have staying power and not feel stressed about whether or not the resources will have longevity
CAF participation rate is ahead of our peers	CAF Donor Participation Rate	3	Today, about 30% of families donate to CAF, which is similar to many other high school-only foundations in the Bay Area. Well-established foundations in high-income areas have been able to reach 60% participation. In five years, 45% (placeholder) will participate. In addition, more families will volunteer for CAF because it's an integral part of our community.	TBD - 45% participation rate	Team 3	"My parents are involved in my school. They don't torture me by being on campus... but they know what's going on, they're actively doing stuff with other parents, and they invest money in my public education."	"It's my obligation to donate what I can to CAF. Every year, I set my donation up by the time school starts and give a little extra before year-end as I can. When I was a freshman parent, I was so impressed with the information I got about CAF. Now, I can truly see the impact when I compare my children's education to that of my friends or coworkers in other areas."	"Carlmont parents care about the quality of their children's education, about their community, and about their children's teachers and staff. They recognize the role that our business community plays in our community. Because of CAF, our students are experiencing what an excellent public education can be."
IN five years we will have a participation rate in excess of our peers			To increase participation rate, we will reach out to the wider community, including alumni, as well as increasing the percentage of current family donors.	We will increase our participation rate from 30% to 50% of current families. We will also increase the total number non-enrolled donors.	Team 1	n/a	sense of shared community investment (broad support) - motivating factor to donate	Sense of community investment
Executive director hired allows foundation to thrive.	Executive Director Hiring	4	Having an executive director will 1) increase donor & volunteer participation from all Carlmont communities - San Carlos, Redwood Shores and Belmont. 2) provide consistency and stability	Executive director will be hired.	Team 1	n/a	Provides a single point of contact. Sets an institutional memory/knowledge standard.	Provides a single point of contact
CAF leadership operates on data and has early visibility into fundraising needs and potential gaps	Data Quality & Early Visibility into Fundraising Needs	5	CAF leadership wants to make decisions based on data. Each functional area should be able to use data in their daily work, without ongoing support from Operations. Data is up to date.		Team 3	"I don't know a thing about fundraising! It's taken care of behind the scenes."  Students have their needs met before they are aware of it. CAF and Carlmont administration work together behind the scenes.	"We are confident that CAF is making good use of our donations, so we're open to making larger donations when we can."  A strong CRM has the most impact on parents and the ability for CAF to fundraise. Parents feel more confident in the data and making larger donations to CAF to support Carlmont.	"We feel supported and can reach out to our principal when we have needs. I know that CAF wants to help and also knows what they do, when. And staff whose jobs depend on CAF funding don't get pink slips every year."  Teachers and staff feel supported and can reach out to the principal about their needs, confident that they will be supported - thereby improving the relationship between staff and the administration.
Corporate funding is 25% of CAF Donations	Business Donors as significant and recurring source of CAF funding	6	Local businesses and developers understand the marketing and visibility benefits of community donations.	Corporate funding is 25% of CAF donations	Team 2	Continuing to get a high quality education.	Less pressure to meet the total goal. More comfort from community support.	Businesses become stakeholders and active members in our local community.
CAF is an active and respected member of the Chamber			CAF is ingrained in the San Mateo County chamber communities so that we attract donors early on.	CAF is an active and respected member of the Chamber	Team 2		Trust and confidence in CAF that we are a professional, well-run organization.	Trust and confidence in CAF that we are a professional, well-run organization.
75% retention of business donors			Corporate donors understand the benefits of being a donor beyond the tenure of their student at Carlmont.	75% retention of business donors	Team 2			Being an active member, achieving goodwill, brand awareness, finding a value in the donation. Businesses feel valued by CAF.
Established connections with the local business community will enhance the foundation.			We will continue to work with local agencies to interact with developers - companies looking to move into the Carlmont community area - to support CAF, in the model of our Kenson arrangement. We will continue to work with local merchants and businesses for ongoing support.	Increase both the number of our business donor donations and the overall dollar amount from those donations.	Team 1	opportunities for internships or mentors or career speakers	Sense of shared community investment	Guest speakers, connections to program specific partnerships (ex. BTI & local biotech firms)
75% of all new local developments donate to CAF			CAF is seen as a professional, established, and well respected organization that new local developers and organizations feel they need to donate to.	75% of all new local developments donate to CAF	Team 2	Gain access to more programs, class sections.	Opportunity for students to have additional programs, tools, class sections.	Understanding that if you want to do business in San Carlos or Belmont, they need to donate to CAF.
Endowment is established with a fundraising process in place.	Established Endowment	7	\$2M is where it would start to make a significant difference... absent any large developer donations, it would be hard to get even to \$1M from where we are today.	First business donation comes in for endowment	Team 3	"I don't know a thing about fundraising! It's taken care of behind the scenes."	"CAF is smart about how they work with our business community, and its efforts take some pressure off families."	"CAF has our backs. Our foundation is out there in the community promoting initiatives that directly benefit teachers and staff."

Detail can be found in this Excel file:



# 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.
- CAF will NOT allow General earmarking of specific funding unless tied to a grant. No Broad-scale earmarking, beyond specific situations like a business agreement or grant.



# CAF at 5 Years – Student Life

CAF funding reduces average class size from 35+ to <30

*"With only 27 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?"*

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

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

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, 2023

## 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 at Back to School Night, went to 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 mental wellness support.



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!

