



Okaloosa Public Schools Foundation

2015 Strategic Plan

A Proposed Path Towards Success

March 10th, 2015



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March 10th, 2015

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Board Members:

Let me again reiterate my enthusiasm and excitement for my role of Executive Director of the Okaloosa Public Schools Foundation. In my short time, I have spoken with many community groups as well as dozens of individuals about our organization. We have genuine strengths and certainly some opportunities for improvement within the organization.

This plan reflects what I believe are the critical steps in developing long term success of the Foundation. This is merely a starting point for our plan. I would request your additions or suggestions, and then Board approval of a final plan for the remainder of 2015 at the March 10, 2015 full OPSF Board meeting.

I look forward to working with each one of you as we strive to make the Okaloosa Public Schools Foundation the best support organization for our students and teachers in Florida!

Sincerely,

Henry A. Kelley, Jr.

Henry Kelley
Executive Director
Okaloosa Public Schools Foundation

In accordance with FS 496.405 all charitable organizations must display this statement:
FLORIDA DEPARTMENT OF AGRICULTURE & CONSUMER SERVICES REGISTRATION: #CH14011

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Executive Summary:

The Okaloosa Public Schools Foundation (OPSF) serves its core mission well. We have 71 students and 71 mentors in the Take Stock in Children program (the only program in Florida to have a 1:1 match).

Fundraising from the community (non-grant monies) has been virtually non-existent (last identifiable fundraising was 2006).

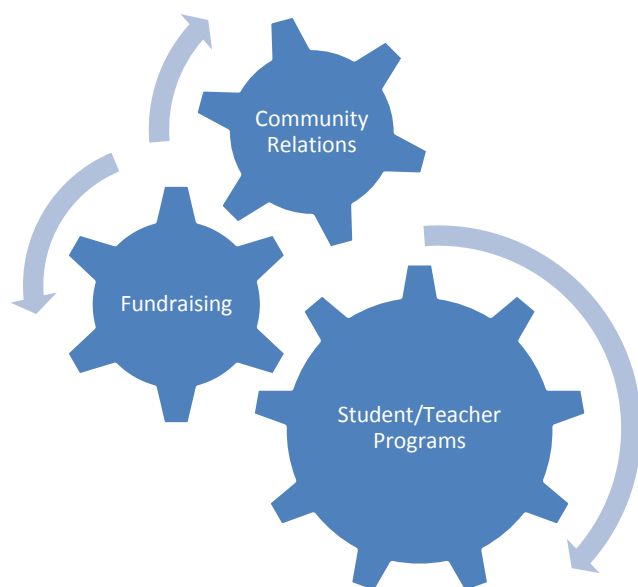
Things we do well and should keep doing: Take Stock in Children management

Things we need to improve or start doing: Fundraising

2015 should be viewed as a year to OPSF organized along a common set of goals and milestones. There are many good things going on, but we need to build up some media presence, infrastructure, and quick hit fundraising to prepare for 2016.

2016 should be the launch of key, significant and ongoing fundraising program(s), marketing initiatives, and operational improvements.

This plan will show multiple initiatives, but these are all part of an interlocking system designed to create opportunities for deserving students and educators.



Timeline:

The OPSF will use this as our working document until revised/approved:

- Present to Dave Braithwaite January 29th
- Met with Debbie Buchanan and Bernard Johnson
- Present to OPSF Full Board February 10th
- Board to edit/vote and ideally approve March Board meetings

Methodology: This methodology was written by Dr. Dave Goetsch and I have used in practice at prior employers and as an instructor for the University of Phoenix and the Florida Institute of Technology.

1. SWOT Analysis (stakeholders) Conducted Sept. 2014
2. Develop Vision
3. Develop Mission
4. Develop Guiding Principles
5. Develop Broad Strategic Goals
6. Develop Tactical Goals and Deliverables
7. Execute the plan
8. Report Progress

Step 1: SWOT Strengths, Weaknesses, Opportunities and Threats (conducted by Board 9/2014)

Strengths:

- Operational execution of Take Stock in Children

Weaknesses:

- Lack of Strategic Direction
- Lack of knowledge of programs within District and Community

Threats:

- Lack of Fundraising (last known fundraiser at least 8/9 years ago)

Opportunities:

Creation of an overall plan to engage District and Community in successful growth of Foundation

- | | | | |
|-----------------------------------|--|---|------------------------------------|
| •Excellence | •Take Stock in Children | •Encourage exceptional opportunities for at risk students | •Career Education |
| •Helping students | •Teacher Recognition (e.g. Golden Apple Award) | •Information | •Fiscal Responsibility |
| •Scholarships | •“Want to be the next hot thing” | •Communication | •Accountability |
| •Integrity | •Partnership with OCSD | •Visibility | •Staff-driven or Volunteer-driven? |
| •Involved (not just a by-stander) | •Compassion | •Signature Event (e.g. Cattleman’s Ball, Little Black Dress): fund-raising event AND District event | •Build community influence |
| •Commitment | | | •Attract new Board Members |
| •Results | | | |
| •Validation | | | |
| •Continuous communication | | | |
| •Catalyst | | | |
| •Enhance | | | |

Where do we stand relative to similar population Florida counties?

Foundation Name	FTE Student Population	Foundation's total revenue 2012-2013	Avg Per FTE
The Education Foundation of Alachua County	27,074	\$755,466	\$27.90
Education Foundation of Martin County	18,424	\$460,725	\$25.01
Educational Foundation of Lake County	40,462	\$1,007,812	\$24.91
St. Johns County Education Foundation	32,649	\$776,586	\$23.79
Escambia County Public Schools Foundation for Excellence	40,139	\$896,771	\$22.34
Bay Education Foundation	25,831	\$411,293	\$15.92
Santa Rosa Education Foundation	25,098	\$300,951	\$11.99
Hernando County Education Direct	21,963	\$219,561	\$10.00
Foundation for Leon County Schools	33,181	\$264,803	\$7.98
St. Lucie County Education Foundation	38,686	\$300,000	\$7.75
<u>Okaloosa Public Schools Foundation</u>	<u>29,597</u>	<u>\$175,288</u>	<u>\$5.92</u>
Clay County Education Foundation	34,542	\$62,255	\$1.80

Data from Consortium of Florida Education Foundations, 2014 Membership Survey

Step 2: Vision

Importance: Sets a tone for our organization. A Vision and Mission statement are required for virtually every grant application.

Speaks to our higher purpose (from 9/2014)

- Communicate to continue excellence
- Inform community to achieve successful partnerships
- Communicate excellence - Develop partnerships - Promote student achievement
- Promote student excellence through public and private partnerships
- Recognition of [academic] achievement
- Promote excellence in student achievement

Operating Vision Statement:

The vision of the OPSF is to create opportunities for our students and teachers to excel beyond a traditional K-12 classroom experience.

Step 3: Mission:

Mission directs our daily thinking:

- Develop community partnerships
- Promote student excellence
- Inform the community of the TSIC program
- Provide enhanced academic opportunities.

Operating Mission Statement:

The mission of the Okaloosa Public Schools Foundation is to promote student and educator excellence by providing them educational opportunities such as the Take Stock in Children program, teacher grants, and other educational initiatives.

Step 4: Guiding Principles

Guiding principles direct the manner in which we will conduct ourselves

The OPSF will: (from 9/2014 workshop)

- Strive For Excellence in all operations
- Be Fiscally Responsible
- Act with Integrity
- Have Board members and staff engaged in projects
- Demonstrate Commitment and Compassion on behalf of our students, teachers and partners by championing their efforts

Step 5: Strategic Goals for 2014-15

1. Grow Foundation Board membership and activity that reflects Okaloosa County and engages Board members.
2. Expand and build operational capacity of OPSF to build a foundation in 2015 for growth in 2016
3. Raise funds for the Foundation and TSIC to enroll more students in TSIC, pay operational expenses, and grow the Foundation.
4. Create awareness in the community of the Foundation and Take Stock in Children Program

Step 6: Tactical Goals

Strategic Goal #1: Grow OPSF Board membership and activity that reflects Okaloosa County and engages Board members.

- a. Recruit Board members through our community partnerships (i.e. FWB Chamber Healthcare committee)
- b. Have Board members involved in project planning/execution
- c. Creation of standing OPSF Committees (Executive Director Ex-Officio Member)
 - i. Governance
 1. Student Pipeline development
 2. Mentor Pipeline development
 3. Board Development and Evaluation
 - a. CFEF Training Seminars
 - b. IBM Training for Boards
 - ii. Finance Committee
 1. This works with Executive Director and Treasurer to review finances, grants, etc. and reports back to OPSF Board
 - iii. Fundraising Committee
 1. Develop Strategy for 2016 long term fundraiser (signature events, annual campaigns, etc.)
 2. Work with Executive Director on 2015 immediate needs
 - iv. Marketing Committees
 1. Develop comprehensive marketing approach

2. Review 4Ps (product, place, price, position), brand, etc.
3. Create collateral and marketing materials including a Foundation website, YouTube page, social media

Strategic Goal #2: Expand and build operational capacity of OPSF to build a foundation in 2015 for growth in 2016

- a. Develop donor and contact database
 - i. What currently exists – just TSIC information
 - ii. MS Access
 - iii. Follow up and thank you program
- b. Develop Grants Management Program
 - iv. Initially, part of Foundation
 - v. Potentially fall under School District after validation
- b. Implement Student recruitment/pipeline building
 - i. Bruner Middle School Model
- c. Implement Mentor Recruitment/Training program
 - i. Community partnerships

Strategic Goal #3. Raise funds for the Foundation and TSIC to enroll more students in TSIC, pay operational expenses, and grow the Foundation.

a. 2015 Fundraising

- i. District contact program (increase teacher participation – currently only get \$82 from a potential 3200 employees)
- ii. Find it, Fund it program
- iii. Executive Director in community in 2015
- iv. Find and grow grant monies (i.e. White-Wilson, Impact 100)

b. 2016 Fundraising

- i. Develop an annual plan methodology, possible “sponsorships” of programs (i.e. Marine Technology program)
- ii. Special or signature events
- iii. Getting sponsors for Foundation Expenses

Strategic Goal 4: Create awareness of the value of the Foundation and our supported programs, such as Take Stock in Children Program.

- a. Grow Foundation membership from 82 members to 500 members by Dec 31, 2015
 - ii. What is current state of the organization
 - iii. Use by-law definitions of membership
- b. Increase media mentions by getting our name out in the public sector
 - iv. Development of annual Editorial calendar
 - v. Leverage all resources in district (i.e. Choice ITV)
- c. Help students and Foundation by creating more community partnerships
 - vi. FWB Chamber Healthcare Committee – FWB HS Bio Med
 - vii. Crestview Chamber Healthcare – Crestview SSTRIDE
 - viii. Other initiatives such as the S.C.I.E.N.C.E Dept of Defense grant
- d. Re-engage the District itself in supporting the program
 - ix. Provide Value to Students
 - x. Provide Value to educators

Step 7: Execute the Plan

- Self-Explanatory

Step 8: Report Progress

- The Report format will be directly from our Goals:

Strategic Goal #2: Expand and build operational capacity of OPSF to build a foundation in 2015 for growth in 2016

Conducted September 2015 OPSF Board meeting at FWBHS
Included message to all teachers to join Foundation
Increased X members in prior month