



2023-2027 Strategic Plan

The themes and initiatives in this plan are intended to guide a consistent strategic direction for LPEF over the next three to five years. This narrative summary is a big picture guiding document that is supported by annual project plans and the annual budgeting process, which will provide opportunities for ongoing flexibility and creativity within the plan. The plan will be integrated into regular board and committee meetings to guide discussions and decisions through agendas that identify alignment with the plan.

The metrics included provide a shared framework for analyzing our progress in advancing this plan. Metrics may be modified along the way to better illuminate progress and guide activities. During the initial planning process specific goals were not set for all metrics where a baseline understanding of the data is first needed. Committees and staff will add annual goals during the process of developing each annual project plan and budget.

Each fall the Executive Director will present an annual plan and budget with narratives describing where resources of time and money are allocated to help advance this plan. Board and committee meeting agendas throughout the year will be primarily organized around these four overall strategies. Board members are encouraged to raise questions and engage deeply in discussion about how ongoing activities support the plan.

We will aim to conduct an in-depth strategic planning process again in three to five years as needed. However, if unforeseen opportunities and/or challenges arise, the board and staff may choose to revisit the strategic planning process at an earlier date.

Additional documents related to the Strategic Plan:

1. Strategic Metrics Dashboard (included below)– updated and shared at monthly board meetings
2. Annual Budget – completed each fall
3. Annual Project Plan - completed each fall
4. Board Governance Calendar – developed annually
5. Board and Committee Agendas – developed monthly based on governance calendar

(Historical Overall Strategies)	PROGRAM/IMPACT Increase our impact and fulfill our mission to “enhance learning opportunities for students in SDLax” <i>Grants Committee</i>	VISIBILITY/ADVOCACY Expand our visibility and “promote community understanding and support for public education.” <i>Exec & Dev Committees</i>	FUND DEVELOPMENT Improve fundraising, expand base of regular donors and maintain or create development programs to support mission. <i>Development Committee</i>	GOVERNANCE Strengthen the organization through sound management and financial practices supported by an involved & dedicated Board. <i>Exec & Finance Committees</i>
2023 – 2027 Strategic Themes “LPEF is....”	A stable and responsive funding partner for the district to financially support students and educators	A cheerleader for public education in our community	A proactive and grateful steward of community support for public education	An effective manager of resources with focus on sustainability
2023-2027 Strategic Initiatives	<ul style="list-style-type: none"> • Maintain sustainability of RAK and Gold Star Grants to meet needs of students and educators • Explore ‘branding’ of the third bucket/big idea part of LPEF support to district • Increase integration of student voice where LPEF and student capacity and priorities align • Maintain existing efforts with improvements towards themes 	<ul style="list-style-type: none"> • Launch of Leadership SDLC group in partnership w/Superintendent • Implement marketing plan, with input from Ad Hoc Marketing Group, including enhanced Social media and local media relationship actions • Develop LPEF advocacy statement about importance of public education • Explore opportunities for PTO/Alumni/student connections • Maintain existing efforts with improvements towards themes 	<ul style="list-style-type: none"> • Strengthen donor stewardship and retention (some emphasis on new) • Expand major donor relationships, including corporate investors • Maintain existing efforts with improvements towards themes 	<ul style="list-style-type: none"> • Recruit diverse and skilled board. • Provide appropriate Board development for members to fulfill duties • Ensure financial policies and procedures sustainable growth (endowment strategies, investment, spending, fee policies, etc). • Maintain existing efforts with improvements towards themes

(Historical Overall Strategies)	PROGRAM/IMPACT	VISIBILITY/ADVOCACY	FUND DEVELOPMENT	GOVERNANCE
Possible Vision Statements	<i>All students have excellent education</i>	<i>Whole community celebrates SDLax and advocates for public education</i>	<i>Whole community is invested in Public Ed</i>	<i>Diverse and professional board and staff grows resources available for enhanced education</i>

2023 Strategic Plan Metrics List - DRAFT

Program Impact
Program Distributions to District
RAK \$\$ Used
Temp Restricted & Pass-Through \$\$
Total \$\$ to District (including pass through)
<i>Grantee Satisfaction Measure (TBD)</i>
<i>RAK Survey Measure (TBD)</i>

Visibility/Advocacy
#Newsletters (print and email)
#News releases
#Social Posts
Teacher appreciation (# of efforts)
<i># Advocacy efforts (TBD)</i>

Fund Development
Total # donors (cumulative)
% donor retention (rolling)
Annual Giving
Events and Sponsorships
Gift over \$1,000
new endowment funds?
1:1 donor contacts/month

Governance
Current Unobligated Cash (Avg reported)
Admin Expense/Distributions
Board giving %
<i>Board Governance Tasks Completed</i>