

The background of the slide features a large, light blue seal of the Orange Unified Public Schools District. The seal is circular, with the words "Orange Unified Public Schools District" around the perimeter. In the center is a stylized orange fruit with several leaves. A dark blue rectangular box is overlaid on the left side of the seal, containing white text.

**ORANGE UNIFIED PUBLIC  
SCHOOLS FOUNDATION**

# **FEASIBILITY ASSESSMENT REPORT**

**PREPARED AND PRESENTED BY**  
BEYOND EDUCATION LLC

# EXECUTIVE SUMMARY



ORANGE  
UNIFIED  
PUBLIC  
SCHOOLS  
FOUNDATION  
OPPORTUNITY  
POTENTIAL





# SCOPE OF WORK



**Assessment Goal:** Investigate the potential benefits and opportunities of reimagining educational foundation to benefit all students within Orange Unified School District



**7 Key Objectives**



**Each Objective Includes Recommendations & Supporting Documents Appendix Resources**



**80+ Hours of Consulting Services (March – June 2021)**

# ASSESSMENT OBJECTIVES

1. Coordinate participation among the District team and designated stakeholders to determine the specific needs of the District.
2. Interview District staff and designated stakeholders and hold facilitated discussions to investigate, document, and inform plans for the establishment of a new foundation or fundraising program to benefit the students and schools of the District.
3. Gather details and advise District on the necessary governing documents and processes to establish a new foundation or fundraising program.
4. Gather internal and external data and input to guide the development of the organizational mission, vision, and values.
5. Research and document opportunities and capacity to adapt and/or launch new desired program models and provide recommendations on implementation strategies based on assessment and prioritized goals.
6. Research and document capacity for fundraising opportunities to advise on District's initial fundraising strategies.
7. Research and document viability of the District operating its own afterschool enrichment program.
8. Phase 1 Assessment Report will be provided to the District, which outlines key findings of programmatic and fundraising assessments along with phase in implementation strategies.



# OBJECTIVE 1: GATHER STAKEHOLDERS & DETERMINE NEEDS







**OBJECTIVE 1:**

Coordinate Broad Participation  
Among OUSD Team & Stakeholders  
to Determine Specific Needs



Regularly Met with OUSD  
Leadership Team



Recruited Diverse Group of  
Stakeholders



Series of 3 Stakeholder  
Virtual Meetings to Gather  
Input

**OBJECTIVE 1 RECOMMENDATIONS:**

- Utilize Stakeholder Group to Recruit Initial Foundation Board
- Maintain Active Communication with Stakeholders

# OBJECTIVE 2: STAKEHOLDER DISCUSSIONS & INTERVIEWS

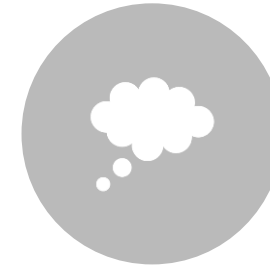






**OBJECTIVE 2:**

Interview District Staff & Stakeholders to Investigate, Document, & Inform Plans for Foundation or Fundraising Program to Benefit students districtwide.



Facilitated Large Group Discussions & Brainstorms



Individual Interviews



Pre- & Post Meeting Surveys

**OBJECTIVE 2 RECOMMENDATIONS:**

- Convene Interested Stakeholders in Further Planning Conversations
- Consider Volunteer & Engagement Opportunities to Sustain & Grow Advocates

# STAKEHOLDER MEETINGS

## Three Stakeholder Group Meetings

- April 29, 2021
  - Current OUSD Programs, Challenges & Needs
- May 18, 2021
  - Building an Understanding of Education Foundations
- June 21, 2021
  - Potential Programming Ideas
  - Mission, Vision, Values,
  - Scope of Governance and Volunteer Leadership

❖ Link to Virtual Presentations ([Report: Page 7](#))

## Individual Interviews with Stakeholders

- 8 Interviews



# SAMPLE STAKEHOLDER FEEDBACK

- “Need to set realistic expectations that are manageable.”
- “Although a separate entity, the community will look at the foundation as part of OUSD and having trust will be key.”
- “Strong interest to keep district and foundation collaborative but separate. All need to understand that the foundation has their own priorities, mission, and vision.”
- “Foundation board members should be representative of the large District boundaries. However, parents in low-income schools are hesitant to get involved. They don't think they have anything to contribute because of language or personal income barriers.”
- “We should not put the fundraising cart before the horse. So many are “fishing from the same pond” and we need to be able to tell the “why” story before doing any fundraising.”
- “School site parent groups already subsidize students that can't pay for after school classes.”

OBJECTIVE 3:

ESTABLISHING  
A  
FOUNDATION







### **OBJECTIVE 3:**

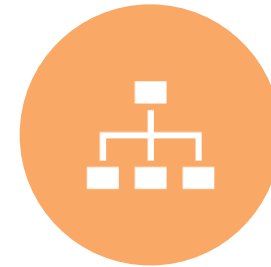
Gather Details & Advise on Governing Documents and Processes to Establish Foundation.



Researched Status of Governing Documents



Establish Master Agreement/MOU Between Foundation & District



Governing Leadership: Board, Advisory & Volunteer Roles

### **OBJECTIVE 3 RECOMMENDATIONS:**

- Recruit Board & Establish Initial Meeting
- Revisit Foundation By-Laws
- Develop Master Agreement/MOU Approved by OUSD & OUPSF Boards
- Develop Year 1 Funding, Staffing & Strategic Goals

# GOVERNING DOCUMENTS STATUS

## Current Status of OUPSF Governing Documentation

1. 501(c)(3) Designation Letter – Active ([copy not located](#))
2. Articles of Incorporation – Active ([page A-4](#))
3. Bylaws – Needs review ([pages 16 and A-33](#))
4. Conflict of Interest Policy and Agreement – Needs to be created. ([sample on page A-34](#))
5. Bank Account – Active ([pages 16 and A-52](#))
6. IRS Form 990/990N - Active ([page A-53](#))
7. State of California Form RRF-1 – Active ([page A-54](#))
8. Franchise Tax Board Form 199 – Active ([page A-55](#))
9. Master Agreement or MOU between OUSD and OUPSF ([details on page 13](#))



# OBJECTIVE 4:

## MISSION, VISION, & VALUES STATEMENTS





## OBJECTIVE 4:

Gather Internal & External Input to Guide the Development of the Organizational Mission, Vision, & Values



### OBJECTIVE 4 RECOMMENDATIONS:

- Use Initial Foundation Board Meeting to Draft Mission, Vision & Value Statements
- Gain Input on Drafted Statements From Stakeholders

OBJECTIVE 5:  
SCHOOL DAY  
PROGRAMS  
FUNDING  
OPPORTUNITIES





## OBJECTIVE 5:

Research & Document Opportunities to Adapt or Launch New Program Models & Recommendations on Implementation Strategies



STEM Education



Innovative  
Programming



Primary Visual &  
Performing Arts



Mental Health  
Counselors

## OBJECTIVE 5 RECOMMENDATIONS:

- Establish Top 3-5 Program Funding Priorities During Master Agreement Development
- Revisit Funding Priorities Annually for Relevance to OUSD & Corporate Partners

# OBJECTIVE 6: FUNDRAISING CAPACITY & STRATEGIES



## OBJECTIVE 6 :

Research and Document Capacity for Fundraising to Advise on Initial Fundraising Strategies



School Site  
Fundraising Disparity



Augment  
vs. Compete with Site  
Fundraising



Prospective Donor  
Sources



# PROSPECTIVE DONOR SOURCES



OUSD Parents:  
\$1.3M Annually



Corporate Partners  
& District Vendors



Local Businesses &  
Landowners

## OBJECTIVE 6 RECOMMENDATIONS

- Create Fundraising Plan & Hire Professional Staff
- Explore Naming Gift & Marketing Sponsorship Opportunities
- Explore Community Fundraising Event Beneficiary Opportunities
- Explore Broad-Based Parent Fundraising Appeal

OBJECTIVE 7:  
AFTERSCHOOL  
ENRICHMENT  
PROGRAMS





# CASE EXAMPLE:

## IPSF PROGRAMS IMPACT

### **Irvine Public Schools Foundation Afterschool and Summer Program Impact (2019)**

- Goal is access and equity for all students vs. profit
- Program fee structures are set to cover operational expenses & offer scholarships

#### ➤ **Afterschool Classroom Enrichment**

- 7,500 enrollments
- \$1M gross revenue

#### ➤ **Summer**

- 10,000 enrollments
- \$2.8M gross revenue



## OBJECTIVE 7:

Research &  
Document  
Viability of District  
Operating  
Its Own  
Afterschool  
Enrichment  
Program



Free Afterschool  
Programming



Fee-Based  
Afterschool  
Programming



Stakeholder  
Input

### OBJECTIVE 7 RECOMMENDATIONS:

- Wait to Shift Current Afterschool Programming to OUPSF
- Readdress Fee-Based Programming Once OUPSF is Established
- Consider Hiring Professional Staff to Manage
- Continue Partnership with Outside ASES Contractors to Provide Free Options to Title1 Schools

# NEXT STEPS FOCUS AREAS

1. Implementation of Board approved Master Agreement to formalize partnership between Foundation and District.
2. Strategic Planning to set mission, vision, and initial fundraising & programmatic goals.
3. Consider volunteer and staffing structures to support Strategic Plan and short- and long-term sustainability.
4. Establish Year-1 budget and fundraising plans to realize objectives.



THANK YOU!

BEYOND EDUCATION LLC