Ensure the Success of Your Funds with Performance-Based Grants Management and Evaluation Strategies

The 2003 Education Funding Summit

July 23-25, 2003 • Wyndham City Center Hotel • Washington, D.C.

Partnerships, Grants and Fundraising Strategies for K-12 Schools


States Cutting School Funding

Officials Predict Toll on Students And Bush's Goals

The No Child Left Behind legislation has resulted in increased accountability and costly "low-performing" penalties, weighing heavy on fiscally starved states. Identify untapped funding resources to satisfy your school's needs!

■ Forge Effective Partnerships

Devise a Plan to Identify and Manage Strategic and Valuable Partnerships

■ Increase Program Funding

Access Funds to Mitigate Budget Cuts and Costly No Child Left Behind Mandates

■ Identify Untapped Resources

Locate and Identify Public & Private Funding Streams and Manage for Results

■ Apply Successful Fundraising Strategies

Lessons Learned and Best Practices for Raising Private Funds for Public Education

■ Improve Program Performance

Increase the Quality, Outreach & Effect of Challenged and Underserved Education Programs

Presented by:

The Performance Institute

Procuring Dollars for Excellence...It's more than Chasing Grants

"We believe education is a national priority and a local responsibility…"
President George W. Bush

Who Should Attend?

- Superintendents
- Assistant Superintendents
- Principals
- Grants Administrators
- Education Fundraisers
- District Administrators
- Grant Managers
- Program Administrators
- Grant Writers
- Trustees

…and all others concerned with securing untapped resources and maximizing the performance of funds!

Dear Education Professionals,

Money is tight. Educators and administrators are dreadfully concerned about the implications of the No Child Left Behind law. Increased accountability, budget deficits and costly "low-performing" penalties weigh heavy on fiscally starved states. Private schools have always dealt with modest budgets. But when tuition increases still don't satisfy needs, the school must seek alternative sources. Fortunately, public and private funding streams have not dried up. Communities are rich in resources and services that can benefit schools. In 2001 alone more than $31 billion dollars was donated by individuals and organizations for education .

Learn how to identify and access untapped resources at the *2003 Education Funding Summit* hosted by The Performance Institute in Washington, D.C., July 23-25, 2003.

It Takes A Village: When Federal and State Funding is Not Enough

A child's academic and emotional development requires the commitment of an entire community. Though communities are complete with resources and services, poorly managed partnerships provide schools with little return. A comprehensive strategic plan must be devised to effectively promote partnerships that increase resource investment and involvement among key community organizations and stakeholders.

Outside funding stimulates action in maintaining critical funding levels. When organizations collaborate they challenge policies and procedures to restructure and reform. Cooperative efforts are, of course, complex. Building partnerships among schools, social service agencies, cultural institutions, businesses, industries, and institutions of higher education require structure and capable leadership. Learn how to forge effective partnerships that ease education budget constraints and deliver services and opportunities to students that schools could otherwise not afford. Increase your chances of procuring dollars with alternative funding streams from public and private grants. And look beyond the bake sale when fundraising to rescue and improve important school programs.

Streamline the Management of Newly Acquired Funds: Comply with New Reporting Mandates

With the successful procurement of funds comes the responsibility of comprehensive administration. Additional funding can increase an already hectic workload. Forgo the headaches and bypass the growing pains. Learn from professionals with internal expertise from the public and private sectors. Take advantage of their knowledge and experience to enhance the performance of your appropriated monies.

Case studies, strategies and best practices for successfully procuring critical funds and resources are waiting for your review! Register today by calling 703-894-0481 or visit us online at www.performanceweb.org. I look forward to seeing you in July!

Sincerely,



Christi Crovato
Associate Director
The Performance Institute

Forge, Build, Maintain and Maximize Effective Partnerships

Defeat Budget Cuts with Alternative Funding Streams

The 2003 Education Funding Summit

Partnerships, Grants and Fundraising Strategies for K-12 Schools

	Track A	Track B
Day One: July 23, 2003		
8:00	Registration and Continental Breakfast	
8:30	Keynote Address: The Business We Are In: Leveraging Outside Funding for K-12 Education	
9:30	Partnerships that Work: Best Practices for Successful, Cost-Effective Collaborations that Endure	Thinking Outside the Sandbox: Building and Sharing School Facilities
10:45	Break	
11:00	Partnering for Services that Enhance Academic Achievement	Corporate and Business Partnerships
12:00	Networking Luncheon	
1:15	Performance Criteria for the Management of School-based Partnerships	Grants and Partners in Innovation: Collaborating for Technology
10:45	Break	
12:00	Networking Luncheon	
2:15	Case Study: Lessons Learned from One Inner-City School-Community Collaboration	Case Study: Lessons Learned from Rural School-Community Collaboration
3:15	Break	
3:30	Working with Universities to Secure Funding and Resources	Fundraising for Today and Tomorrow
4:30	Adjourn	
Day Two: July 24, 2003		
8:00	Continental Breakfast	
8:30	Trends and Developments in Federal Funding	Establishing a Strategic Plan and Setting Priorities for Grants and Partnerships
9:30	Grants for Professional Development	Best Practices in Procuring Grants from Private Organizations and Foundations
10:30	Break	
10:45	Partnerships and Grants for Private Schools	Grants for Science and Math Programs
11:45	Networking Luncheon	
1:00	Grants for Special Education	Management of Grants and Funding Since No Child Left Behind
2:00	Case Study: Grant Project and Evaluation	Beyond the Bake Sale: Best Practices in Education Fundraising
3:00	Break	
3:15	Event Fundraising: Organizing Events that Produce Profits	Dollars for Excellence: Procuring Money for Schools and Education Programs
4:30	Adjourn	
Day Three: July 25, 2003		
8:30	Continental Breakfast	
9:00	Workshop A: Developing a Strategic Plan for Grants and Fundraisers	
12:00	Luncheon	
1:00	Workshop B: Creating Funding Partnerships	
4:00	Adjourn	

No School Left Behind: Education Partnerships, Fu

Agenda and Speaking Faculty

Day One: July 23, 2003

8:00 **Registration and Continental Breakfast**

8:30 **Keynote Address: The Business We Are In: Leveraging Outside Funding for K-12 Education**

The nature of the work is more than chasing grants - it's functioning as an educational planner, marketer, partnership broker, and resource manager

- Accountability systems to measure performance
- Strategies for accessing funding streams
- Professional growth of K-12 fundraising - and fundraisers
- Identify organizational strategies and the structure of giving for K-12 education

Charlotte Harris, *Development Director, Boston Public School System*

9:30 **Partnerships that Work: Best Practices for Successful, Cost-Effective Collaborations that Endure**

- Conduct program needs assessment
- Identify potentially successful, reciprocally beneficial partnerships
- Craft your message to initiate activities
- Navigate complex collaborations with a strategic communications plan

Dr. Steven Sheldon, *Postdoctoral Research Scientist, Center on School, Family and Community Partnerships, Johns Hopkins University*

10:45 **Break**

11:00 **Partnering for Services that Enhance Academic Achievement of ALL Children**

- Develop plans with urban districts to ensure ALL students are included in NCLB and local school reforms using assets mapping and technical assistance resources
- Expand relationships with parents, universities, and other community agencies and organizations to promote the inclusion of all students in school and community
- Use of a systemic change framework to connect academic performance with student, professional effort, school effort, and district effort
- Build school capacity through use of Building Leadership Teams and Professional Development modules focused on scientifically-based research and "doing what works"

Anne Smith, Ed.D., *Education Research Analyst, Office of Special Education Programs, U.S. Department of Education*
Lisa Floyd, *Project Coordinator, National Institute for Urban School Improvement*

12:00 **Networking Luncheon**

1:15 **Performance Criteria for the Management of School-based Partnerships**

- Identify performance-based planning, budgeting, and managing
- Allocate resources that support determined goals
- Develop targets and measures to assess progress toward goals
- Ensure communication and involvement of partners

Susan Segal, *Communities in Schools**

Free Subscription to Institute Research:

The Performance Institute serves as the nation's leading repository of thoroughly researched, documented, catalogued and peer-reviewed "best practices" in a multitude of issue areas. Each month, the Institute publishes its research through a variety of e-mail publications. To subscribe to the Institute's newsletter, please e-mail Performance@Peformanceweb.org. For more information on Institute programs and services, visit us on the Internet at www.PerformanceWeb.org.

9:30 B: **Thinking Outside the Sandbox: Building and Sharing School Facilities**

Schools must identify alternatives to relying on taxes or tuition alone to meet the ever-increasing needs for additional and updated school buildings, while also reducing the need for more schools and classrooms.

- Partner with qualified real estate investors and developers
- Best strategies in managing funding streams
- Maximize your dollars with tax strategies
- Mitigate problems with risk management policies

Kevin Sullivan, *National Institute of Building Sciences*

10:45 **Break**

11:00 B: **Corporate and Business Partnerships**

Schools must work within a limited budget while heeding the demands for improved academic achievement. Consequently, many schools have now turned to businesses for anything from cash and computers, to educational materials and services. In exchange, businesses receive benefits like exclusive vending rights, advertising space in school hallways or better prospects for a technically skilled labor pool.

- Establish mutually beneficial school-business partnerships
- Forge corporate sponsorship with "Partners In Education" Programs
- Develop school-to-career activities with corporate sponsorships

Laynee Timlin, *Director of Community Relations, Virginia Beach City Public Schools*

12:00 **Networking Luncheon**

1:15 B: **Grants and Partners in Innovation: Collaborating for Technology**

Accepting technology hand-me-downs from businesses hold both promises and problems. Reduce your school's fiscal burden by understanding the long-term costs involved in building and operating a network of computers. Identify sources that lead to upgrading your school's technology capabilities and effectiveness with tips and lessons learned on valuable and meaningful partnership structures. Learn to budget adequately and manage funds to cover all the associated costs-and build and operate their networks in the most cost-efficient way to achieve your technology goals.

- Establish standards for accepting business donations
- Locate donors to establish an ongoing donation program
- Lessons learned from technology partnerships
- Apply better budget and business practices to improve your school's information technology capacity
- Identify effective and valuable technology partnerships structures

Keith Krueger, *Executive Director, Consortium for School Networking*

2:15 **Case Study: Lessons Learned from Inner-City School-Community Collaboration**
- Removing the barriers between schools and inner-city communities
- Building alliances among teachers, parents, and community members
- Develop an integrated strategy to help students succeed in their inner-city setting
- Strategies for tapping into community funds and resources for education

Barbara Haxby, *Director, Roots and Wings Program, Success for All Foundation*

3:15 **Break**

3:30 **Working with Universities to Secure Funding and Resources**

Higher educational institutions have a wealth of intellectual, material and human resources; are typically the largest employers in their region; and are essential partners in sustained school-wide and system-wide educational improvement. Partnerships between higher educational institutions and K-12 schools can and should be mutually-beneficial. Identify successful partnerships based on eighteen years of work initiated by the University of Pennsylvania with Philadelphia public schools. Discuss strategies directed towards tapping, integrating, and mobilizing the enormous untapped and non-integrated resources of communities for the purpose of improving schooling and community life.

Cory Bowman, *Associate Director, Center for Community Partnerships and PPPS, University of Pennsylvania*

4:30 **Adjourn**

2:15 B: **A Case Study: Lessons Learned from Rural School-Community Collaboration**

Educational challenges in rural regions can be significantly different from those endemic to more populated areas. This case study reviews lessons learned while providing resource information designed to help rural schools and communities learn how to effectively support each other so both can thrive. Learn from proven practices for connecting rural school needs and community resources.

Vangie Orozco, *Program Specialist, Southwest Educational Development Laboratory*

3:15 **Break**

3:30 B: **Fundraising for Today and Tomorrow**
- Principles and techniques
- Successful marketing strategies
- Choosing the right fund raising vehicles
- Enlisting an effective fundraising team

Kathy Knox, *ACFRE, Director of Development, The Independent School*

4:30 **Adjourn**

Day Two: July 24, 2003

8:00 **Continental Breakfast**

8:30 **Trends and Developments in Federal Funding**
- Examine federal funding opportunities
- Identify administrative rules and reporting requirements
- Establish effective ways to measure progress
- Understand new standards and how to be compliant

Blanca Rodriguez, *Grants Specialist, U.S. Department of Education*

9:30 **Grants for Professional Development**
- Identify funding sources for teacher, principal and paraprofessional development
- Effective strategies for partnering with universities and vendors in professional development activities
- Integrating technology for cost effective staff development
- Requirements for including professional development as an activity in certain federal grant projects

Frank Mandley, *Director, Grants Administration and Government Programs, Broward County Public Schools, Fort Lauderdale, Florida*

10:30 **Break**

10:45 **Partnerships and Grants for Private Schools**

Private schools have always struggled financially. While student enrollment continues to climb, tuition increases alone do not cover the steep costs of running a successful and innovative school. Identify and develop alternative methods of procuring funds to ensure the quality of education and academic achievement for all students.

8:00 **Continental Breakfast**

8:30 B: **Establishing a Strategic Plan and Setting Priorities for Grants and Partnerships**
- Conduct needs assessment
- Apply performance-based management and evaluation strategies
- Enlist capable leadership
- Shape your vision and craft your message
- Identify and approach prospective partners

Carl DeMaio, *Senior Fellow RPPI/President, The Performance Institute*

9:30 B: **Best Practices in Procuring Grants from Private Organizations and Foundations**
- Identify and validate prospective donors
- Evaluate which grantors are right for your project
- Build an annual fund donor base
- Apply proven strategies when preparing successful proposals

Anita Plotinsky, *Director, The Foundation Center*

10:30 **Break**

10:45 B: **Grants for Science and Math Programs**
- Trends in science and math funding
- Locating funding agencies and grant opportunities
- Preparing successful proposals
- Procuring and managing subject specific grants

Diane M. Spresser, *Senior Program Coordinator, Math and Science Partnership Program (MSP), National Science Foundation*

Dionie Henry, *Branch Chief, Division of Grants and Agreements, National Science Foundation*

11:45 **Networking Luncheon**

- Identify potential partners
- Develop successful fundraisers
- Access public and private grants available

Sr. Mary Tracy, *Associate Executive Director, National Catholic Education Association*

11:45 **Networking Luncheon**

1:00 **Grants for Special Education**
- Recent trends in special education grants
- Locating foundations and benefactors
- Preparing successful proposals
- Procuring and managing subject specific grants

Dr. Christine Mason, *Council for Exceptional Children and Yes I Can! Foundation*

2:00 **Case Study: Grant Project and Evaluation**
- Performance and evaluation standards
- Aligning program practices and grant use with your priorities
- Establishing a Strategic Plan
- Lessons learned

Charlotte Harris, *Development Director, Boston Public Schools*

3:00 **Break**

3:15 **Event Fundraising: Organizing Events that Produce Profits**
- Identifying events that will yield revenue
- Securing sponsorship
- Tapping into alumni pockets
- Enlisting volunteers
- Strategies for planning, implementing and troubleshooting fundraising events

Arthur Roach, *Fundraising Consultant*

4:30 **Adjourn**

1:00 B: **Evidence-Based Standards: Grants and Funding Since No Child Left Behind**
- NCLB requirements for necessary components of reading programs under Early Reading First and Reading First
- NCLB requirements for research-based methodologies
- Evaluating research-based assertions of proprietary models and "packaged" programs
- Measuring the outcomes of funded programs

Frank Mandley, *Director, Grants Administration and Government Programs, Broward County Public Schools, Fort Lauderdale, Florida*

2:00 B: **Beyond the Bake Sale: Best Practices in Education Fundraising**

Fundraising for school programs and salaries tends to increase during economic downturns. In some states, fundraisers act as lifelines for underserved programs endangered of being cut. The success of fundraising often depends on where you live and the income level of your PTA and community residents. Learn how many schools are able to sustain salary increases and critical school programs when state and federal funding just isn't enough.

Marshall Ginn, *Principal and Founder, Capital Development Strategies*

3:00 **Break**

3:15 B: **Dollars for Excellence: Procuring Money for Schools and Education Programs**
- Marketing strategies that attract support
- Identifying local contributors
- Maximizing fund-raising capabilities
- Distributing funds effectively and responsibly

J.J. Baskin, *Director of Development, Southwest Educational Development Laboratory*

4:30 **Adjourn**

Day Three: July 25, 2003

8:30 **Continental Breakfast**

9:00 **Workshop A: Developing a Strategic Plan for Grants and Fundraisers**

This application workshop addresses challenges and best practices when developing a strategic plan for procuring alternative funding for private and independent schools. Apply performance-based strategies when raising and managing private funds. Implement a capital campaign and fundraising plan that ensures that dollars raised are efficiently managed to help finance challenged and underserved education programs.

In this hands-on workshop, learn how to develop effective plans and practical solutions tailored to fit your school's needs and goals. Examine together the various components of fundraising and capital campaigns, including the advantages and disadvantages of sponsoring initiatives such as special events, direct mail, telemarketing, and planned giving to generate donations. Integrate strategies learned to successfully obtain and manage funds for your school through multiple funding streams. Initiate direct campaigns among donors and private individuals; individual solicitations for deferred gifts; and other fundraising strategies!

John Cunneen, Executive Vice President, Cunneen Fundraising

12:00 **Luncheon**

1:00 **Workshop B: Creating Funding Partnerships**

This three hour, interactive workshop will assist you in developing a strategic plan to initiate and maintain school-based funding partnerships. Learn how to enlist leadership that will identify and manage strategic and valuable collaborations. Devise a marketing plan that reflects the school's vision. Identify successful approaches to initiating partnerships that satisfy your school's needs. Apply proven strategies to develop diversified and balanced local funding for long-term program sustainability.

The use of joint ventures and establishing funding partnerships between the public and private sectors can be complex and time consuming. The public sector seeks expertise and innovation from the private sector, whereas the private sector looks for business opportunities, a new market and a steady funding stream to sustain its investment. Partnerships are effective when each party recognizes the objectives of the other and prepares to build a quality, long-term relationship. Learn to work effectively alongside the private sector to direct resources that will support classrooms, academic programs, professional development and technology.

*Invited**

4:00 **Adjourn**

*Invited**

A Comprehensive, Interactive Forum on the Proactive Methods of Procuring Funds and Partnerships to Ensure No School is Left Behind

The 2003 No Child Left Behind Summit

September 24-26 the Performance Institute will be hosting a No Child Left Behind Summit in Washington, D.C. to assist school districts in ensuring compliancy, integrating performance measures and strategic planning to achieve Adequate Yearly Progress goals!

According to state departments of education, more than 7,000 schools nationwide are considered in need of improvement-a significant number of them in the second year in this status; therefore disadvantaged students who attend those schools are eligible for supplemental services. In most cases the school district pays for the supplemental services directly.

When Title I funds are being used for transportation for exiting students and supplemental funding for disadvantaged students, it is imperative that new funding streams are tapped to achieve academic excellence. It is just as important to apply performance measures and align AYP goals with grants procured and dollars spent.

Join us in Washington, D.C. at the *No Child Left Behind Summit* to engage in a valuable forum for the exchange of information and practices on accountability, testing, funding, evidence-based standards and performance management.

8 Key Reasons to Attend:

1. **Develop Comprehensive Plans and Strategies on How to Forge, Build, Maintain and Maximize Effective Partnerships**
2. **Integrate Performance Measures to Successfully Manage Funds**
3. **Access Untapped Community Resources and Services**
4. **Enhance Academic Achievement through Community Involvement**
5. **Finance Critical, Underserved School Programs with Grants**
6. **Explore Funding Resources and Identify Winning Strategies to Secure Funds**
7. **Formulate a Strategic Plan, Set Priorities and Implement New Measures**
8. **Identify Successful, Cost-Effective School Collaborations that Endure**

Rave Reviews from Past Summits:

"I got some great advice and a great opportunity to network!"

Joanne Morgan,
Syracuse City Schools, New York

"Topics were very well presented, and pertinent to what I do."

John Farley, Columbus Public Schools

"Great quality of information; very energizing speakers!"

Deb Abrahamson, Oak Park School District 97

Hotel Information:

The *2003 Education Funding Summit* will be held at the Wyndham City Center Hotel in Washington, D.C. Special hotel rates will be available to conference attendees, provided that your reservations are made by June 9, 2003. Please contact the hotel with the number provided below to make reservations. Be sure to ask for the Performance Institute conference rate. The hotel will ensure that your conference experience is not only educational but also comfortable and enjoyable in every aspect.

Wyndham City Center Hotel • 1143 New Hampshire Ave., NW
Washington, DC, 20037
Tel: 202-775-0800 • Fax: 202-331-9491

Tuition:

The fees for attending the *2003 Education Funding Summit* are as follows:

Early Registration (by June 23):
- Summit only:. $995
- Summit and one workshop:. $1,395
- Summit and both workshops:. . . . $1,595

Late Registration (after June 23):
- Summit only: $1,095
- Summit and one workshop:. $1,495
- Summit and both workshops:. . . . $1,695

Group Discounts:

For information about group tuition discounts available for the *2003 Education Funding Summit*, please contact James Simpson at 703-894-0481 or Simpson@PerformanceWeb.org.

Administrative Note: A 10% cancellation fee on registration will be charged for cancellations received less than three weeks from the date of the conference. As speakers are confirmed six months before the event, some speaker changes or topic changes may occur in the program. The Performance Institute is not responsible for speaker changes, but will work to ensure a comparable speaker is located to participate in the program.



The Performance Institute
1515 N. Courthouse Road, Suite 600
Arlington, VA 22201

Registration Form for the *2003 Education Funding Summit*

Call (703) 894-0481; Fax This Form To: (703) 894-0482;
or visit www.PerformanceWeb.org

☐ Yes! Register me for the summit.

☐ Yes! Register me for the summit and one workshop.

☐ Yes! Register me for the summit and both workshops.

☐ Please call me. I am interested in a special group discount for my team.

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