



Petaluma  
EDUCATIONAL  
FOUNDATION

# Strategic Plan 2024-2027



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# From the Executive Director

The Petaluma Educational Foundation (PEF) stands at a crossroads of opportunity. While its legacy of fundraising, impactful programs, and dedicated staff is undeniable, a new generation of administrators and teachers unfamiliar with PEF, a post-pandemic educational landscape, and a shifting fundraising climate all necessitate a strategic leap forward.

Nationally, educational foundations are responding to similar challenges by embracing innovation, forging deeper partnerships to support students, and diversifying funding streams. PEF recognizes the strategic plan process as a springboard for exploring creative initiatives that address the needs of educators and students facing a post-pandemic reality. PEF can increase visibility and relevance beyond its established circles by strengthening its relationships with educators and donors. Finally, the current fundraising landscape demands a multifaceted approach, encompassing everything from building out endowments to securing the long-term stability of earned income.

By embracing a forward-thinking approach, the strategic plan can write a new chapter for PEF that secures its legacy for future generations.

On behalf of the PEF Board of Directors and Staff, thank you for your continued support. We could not do this vital work without you.

With deepest gratitude,

Maureen Highland  
Executive Director



# Our Strategic Plan

The Petaluma Educational Foundation (PEF) proudly presents its strategic plan, a comprehensive roadmap for funding to support the future of impactful education in our community. Crafted in collaboration with teachers, administrators, donors, and our dedicated board, this plan reflects our unwavering commitment to enriching the educational experiences of all Petaluma students.

This collaborative effort captures the aspirations, strengths, and challenges identified by our stakeholders. We have outlined strategic goals focused on enhancing and expanding our programs, storytelling, diversification of funding, and fortifying our operations. These goals leverage our established strengths in community engagement, collaboration, organizational resilience, and impactful programs – the pillars of our success.

We don't shy away from challenges. We view them as opportunities for proactive solutions and adaptation to growth. With this strategic plan as our guide, PEF, empowered by the generosity of our donors and in collaboration with our educational and community partners, is poised to continue to make a significant and lasting difference for the students of Petaluma.







Our mission and vision are the foundation for the strategic plan. By building on this solid base, the strategic plan outlines a path forward, ensuring that every step we take is aligned with our core values and long-term objectives.

## Vision

PEF's vision is to create impactful educational opportunities for all students in our community.



## Mission

We fund programs that promote critical thinking, creativity, student well-being, and lifelong learning.



# Our Work

**Total  
Distributed  
\$9,143,004**

**Established  
83  
Scholarship  
funds**

**Subsidized  
Impactful  
Educational  
Programs in  
35**  
public, charter, &  
not-for-profit  
private schools

**Awarded  
\$4,585,055**  
since the  
scholarship  
program's  
inception in  
1990

**Enriched Over**  
12,000  
students'  
academic  
experience  
annually

**Awarded  
\$4,557,949**  
since the grant  
program launched  
in 1983





# Our Vision: Setting Strategic Goals

Setting ambitious yet achievable goals is crucial in a strategic plan, ensuring a clear direction for organizational growth and impact. Ambitious goals stretch the organization beyond its current capabilities, promoting innovation and continuous improvement. Achievability ensures that these goals remain grounded in reality. Together, they balance aspiration with practicality, guiding the Petaluma Educational Foundation toward sustained success. This approach aligns with the aspirations of educators, donors, PEF board, and staff, fostering a collective commitment to our students.

**GOAL 1:**  
Enhance and  
Expand PEF  
Programs

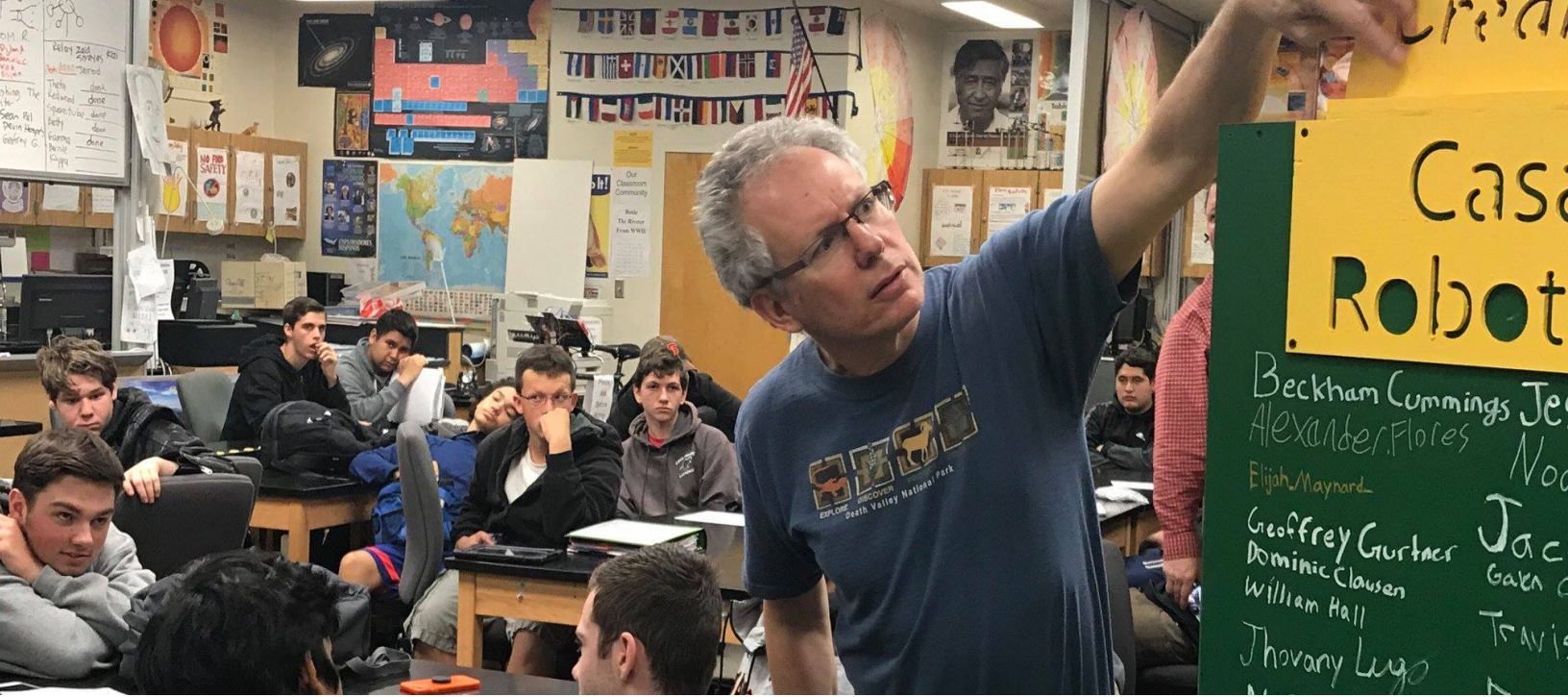
**GOAL 2:**  
Share Our Story

**GOAL 3:**  
Diversify &  
Increase Funding  
Streams

**GOAL 4:**  
Fortify Operations







## STRATEGIC GOAL 1: Enhance and Expand PEF Programs

PEF intends to broaden the scope and impact of its programs. Recognizing the evolving needs of educators and students, it focuses on aligning programs more closely with these needs, thereby enhancing their effectiveness and reach. Approaches include engaging stakeholders for alignment, updating the grant committee, and directly communicating with teachers about funding opportunities.

Engage  
Stakeholders to  
Align Programs  
with Students  
Pressing Needs

Broaden  
Engagement with  
the Wider  
Community

Reduce Barriers  
and Increase  
Participation in  
Grant Process

### Outcomes for Strategic Goal 1

PEF will solidify its reputation as a bridge between educators, donors, and the community by being a responsive and impactful grant maker, successfully funding programs closely aligned with the needs of students by supporting educators. The community, donors, and educators will all know and respect PEF for its innovative programs. There will be an increase in educators applying for grants due to the ease of the application process.





## STRATEGIC GOAL 2: Share Our Story

This goal emphasizes the importance of communicating PEF's values, achievements, and impact to a broader audience. It proposes strategies for community engagement, diversified communication methods, and marketing efforts to share PEF's story.

Deepen Stakeholder  
Engagement to  
Increase PEF's  
Impact

Amplify PEF's  
Voice and Visibility

### Outcomes for Strategic Goal 2

PEF will establish a deeper connection with the community by effectively sharing its story, showcasing its impact, and highlighting its values through diversified communication strategies. This enhanced visibility and understanding will lead to greater community engagement, broader support from diverse audiences, and an increased awareness of PEF's role in fostering educational excellence through fundraising.





## STRATEGIC GOAL 3: Diversity & Increase Funding Streams

Recognizing the need for a stable and diversified funding base, this section outlines strategies to increase and diversify PEF's funding sources. It includes enhancing endowments, developing a planned giving program, and creating a comprehensive fundraising plan encompassing various funding activities to ensure long-term financial stability.

Strengthen  
Endowment and  
Planned Giving

Diversify and  
Optimize  
Fundraising  
Efforts

### Outcomes for Strategic Goal 3

By diversifying and enhancing funding sources, PEF will continue to secure a financial foundation that supports the mission sustainably. This strategic financial diversification will empower PEF to expand its educational impact, ensuring long-term stability, and responsiveness to the evolving needs of educators.





## STRATEGIC GOAL 4: Fortify Operations

This goal focuses on strengthening PEF's organizational backbone and offers measures to improve efficiency and organizational sustainability. It covers technological advancements, organizational restructuring, and the development of an action plan for relocating PEF offices. The aim is to build a robust operational framework that supports PEF's strategic objectives long into the future.

Invest in Long-Term  
Organizational  
Sustainability

Leveraging  
Technology for  
Efficiency and  
Impact

### Outcomes for Strategic Goal 4

PEF will fortify its operational framework, enabling it to navigate the dynamic changes in the educational system and donor development with efficiency and adaptability. By investing in technological improvements and refining its internal processes, PEF will bolster its capacity for mission fulfillment.



# Our Commitment to the Students of Petaluma

The Petaluma Educational Foundation's Strategic Plan outlines a clear and actionable roadmap for the organization's future. Developed through collaborative efforts of the staff and board, it prioritizes securing essential donor support and addressing the crucial needs of educators. Each strategy and supporting action plan aligns with the vision of creating an impactful educational experience for all students. The Foundation's commitment to this vision positions it to strengthen relationships with donors, bolster educational programs, and ultimately contribute to a brighter future for students and educators alike.

