



Collaboration Guidelines

Overview

The Pleasanton Partnerships in Education Foundation (PPIE), the Pleasanton PTA Council, and the Lydiksen Elementary Parent Faculty Club (PFC) are pleased to offer collaboration guidelines to enable their organizations and participating school site Parent Clubs of the Pleasanton Unified School District (PUSD) to effectively collaborate for the benefit of Pleasanton students, teachers, and schools.

The purpose of these guidelines is to align the outreach and communications of these organizations in order to best serve PUSD teachers and students and to enable dynamic classroom experiences that foster 21st century leaders. Guideline terms may be amended from time to time by mutual agreement of the leadership of the participating organizations.

Overview of PPIE	Overview of Parent Clubs (e.g., PTA/PTSA/PFC)
<p>The mission of PPIE is to enhance learning experiences for PUSD students through a partnership of business, education, and the community. We work closely with school site parent clubs and the school district to raise funds and promote equitable funding across the district to create a positive environment for our teachers and students. PPIE has provided funding support for school staff (teachers, specialists, coaches), smaller class sizes, technology, and teacher and student grants. We raise funds through parent donations and matching gifts, which are leveraged with corporate giving, foundation partnerships, and special events.</p>	<p>The mission of the Pleasanton Parent Clubs is to empower and support their units and members, develop leadership, and engage and empower families and communities to advocate for all children. Parent Clubs work closely with school site parents and staff to make every student’s potential a reality and to raise funds in order to create a positive environment for school site teachers and students. Parent Clubs have provided funding support for classroom materials and activities, parent and teacher development, technology, and staffing support. We raise funds through parent donations and matching gifts, supplemented by corporate giving and special events.</p>

Issues Identification

PPIE and the Parent Clubs have joined together to establish these guidelines in order to address the following issues that affect our joint goal of supporting Pleasanton teachers and students:

- 1. Donor Fatigue** - Donors are hit by many different organizations with requests for funds.
- 2. Donor Confusion/Transparency** - Trust level between donors and spenders is low. The donor community doesn’t fully understand how school funding occurs and where money goes.
- 3. Equity & Flexibility** – School sites desire balance between an equitable distribution of funds between and within schools and the need for flexibility in fundraising and allocation.

Collaboration Vision

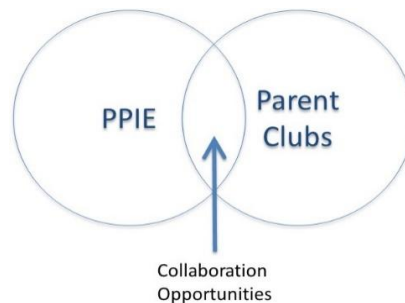
Positive, collaborative working relationship to aid Pleasanton schools and to partner together to build strong classroom experiences that enable Pleasanton students to become 21st century leaders.

Goals

These collaboration guidelines are designed to enable the following goals:

1. Increase collaboration between the participating organizations to accomplish our vision.
2. Enable the PUSD community to best support a positive student experience and success.
3. Mutually support organizational communications and outreach with the community.
4. Reduce donor confusion and fatigue.
5. Increase overall engagement rates and contribution levels for the benefit of PUSD schools and community.
6. Enable increased school site input with respect to PPIE allocation of funds to support PUSD schools.

These guidelines are not designed to restrict or restrain any organization with respect to how it raises or allocates funds. Instead, the guidelines are intended to enable opportunities for collaboration in terms of outreach and communication with the PUSD community.



Elements of Guidelines

These guidelines include the following elements, which may be modified or supplemented per mutual agreement of the leadership of the participating organizations.

Guideline Element	Description
Governance	Outlines governance plan between each of the organizations, including updating goals and aligning expectations.
Strategic Coordination	Confirms how PPIE and the parent clubs will work together, on an annual basis, to recommend classroom-funding priorities to PUSD.
Communications	Outlines strategy to ensure open communication between PPIE and Parent Clubs.
Marketing	Outlines marketing strategy to donors.
Funding Strategy	Outlines strategy for how each organization will raise funds.

Governance

PPIE and the Parent Clubs will endeavor to coordinate and mutually inform each other's organizations on general policy and strategic direction, top-line budget, and major events through the following efforts:

- PTA Council may place one leadership representative on the PPIE Board. School site Parent Clubs may nominate additional members to the PPIE Advisory Council. PPIE Board and Advisory Council members will abide by the terms of these entities as set forth by PPIE, including voting rights. The PTA Council representative may serve for a minimum of a 1-year term and will have a review every 3 years as part of PPIE's Board review process.
- PPIE will have one representative on the Parent Coordinating Committee (PCC) and will abide by the terms of the PCC. In addition, all Parent Club Executive Boards at each PUSD school site will enable a communications liaison with PPIE in a manner determined independently by each Executive Board. For example, communications liaisons may be existing Parent Club Executive Board members assigned to serve as PPIE liaisons or PPIE

representatives who serve as liaisons to the Parent Club Executive Board. The purpose of these communications liaisons is to facilitate communication between PPIE and Parent Clubs at each PUSD school site. Representatives will share information between the organizations on a regular basis and in a manner that facilitates achieving the goals specified in these guidelines.

- PPIE and Parent Clubs will have an ongoing working group, P4 (Parent club-PPIE Pleasanton Partnerships) Council, which includes but may not be limited to PPIE and Parent Club leadership. The P4 Council will meet during the year to coordinate activities and ensure ongoing collaboration as per these guidelines. Key responsibilities of the P4 Council include the following:
 - ◊ Collect and submit annual recommendations to PUSD for strategic and funding priorities (as defined in the Strategic Coordination section of these guidelines).
 - ◊ Annually review these guidelines and associated collaboration, and make recommendations for improvement, including possible amendments. As stated, the guidelines may be amended from time to time by mutual agreement of the leadership of the participating organizations.
- All participating organizations will work in a spirit of collaboration to develop programs that serve the best interests of the Pleasanton education community. At the same time, all participating organizations agree that PPIE, PTA Council, and Parent Club units will make fundraising, funding, and other related decisions that serve their unique organizational missions and that are in accordance with their own governance policies and procedures. When areas of disagreement arise concerning areas of strategic coordination, as described below, the matter may be referred to the P4 Council for discussion and resolution. If the P4 Council is unable to reach agreement, the matter may be referred to the PPIE Board if the matter is relevant to PPIE and to the PTA Council and/or Parent Club units if the matter is relevant to the Parent Clubs.

Strategic Coordination

PPIE will actively include Parent Clubs in forming recommendations for classroom-funding priorities and initiatives to benefit Pleasanton students and teachers. On an annual basis, PPIE and the Parent Clubs will work together to solicit input from PUSD staff and to develop and present recommendations to PUSD leadership as part of an effort to help shape the state of our classrooms and to enable 21st century leaders among our teachers and students. PPIE and Parent Club leaders will work together to define the process, format, and schedule for this effort. These recommendations will form the basis for dialogue with PUSD leadership regarding PUSD and PPIE funding priorities and initiatives that affect the Pleasanton classroom experience for teachers and students. The following suggested strategic-coordination schedule may be modified as needed.

Month	Strategic-Coordination Activity
Mar	PPIE/Parent Clubs collect input from school stakeholders (e.g., PUSD staff, principals, teachers, School Board) regarding funding priorities.
Apr	Continue collecting feedback on priorities from donor/parent/community.
May	PPIE and Parent Clubs agree on funding plan for next campaign and present to PUSD and School Board. Parent Clubs begin to develop budget for next school year.
Jun	Develop Marketing and Communication campaigns.

Jul	Begin communication regarding Registration Day.
Aug	Kick off campaigns to collect money based on defined funding priorities.
Sept	Parent Clubs finalize budget/current school year funding priorities for each school site (may be earlier at school site discretion).
Oct	
Nov	
Dec	
Jan	
Feb	PPIE presents campaign results to PUSD School Board for the upcoming school year.

Communications PPIE and the Parent Clubs will endeavor to facilitate smooth and timely communications regarding matters pertaining to these guidelines. The organizations will develop a mutual communications plan that will include, but may not be limited to the following:

- Regular meetings of the P4 Council to review the impact of these guidelines and to ensure that the organizations are working together to achieve their goals.
- A protocol and schedule for the strategic-coordination process, as proposed above, to ensure coordinated strategic recommendations on classroom-funding priorities to be issued to PUSD.
- Consensus on communications to support our fundraising goals, including coordinated outreach for fundraising at school site registration.
- Protocols to ensure effective communications between PPIE, PTA Council, and Parent Club school site Executive Boards.

Marketing PPIE and the Parent Clubs will coordinate messaging to donors regarding organizational purpose and vision, fundraising, and major programs and events. Specifically, they will coordinate outreach for school registration, both at the school sites and online, to achieve the goals of these guidelines. The organizations will also share information regarding major fundraising initiatives and activities in order to reduce potential donor confusion and fatigue among all donors in the Pleasanton community.

Funding Strategy PPIE and the Parent Clubs will align funding strategy and outreach efforts to mutually achieve their vision to build a dynamic classroom experience for Pleasanton students to enable the formation of 21st century leaders.

- Each year, PPIE and Parent Clubs may share information on overall goals and results for funding and participation rates that are designed to help both the organizations and school sites improve education for students in Pleasanton schools.
- Each year, PPIE and Parent Clubs will seek to coordinate fundraising during school site registration at the elementary, middle, and high school levels. PPIE and parent clubs will coordinate online fundraising during school site registration for the mutual benefit of all parties.
- PPIE and Parent Clubs may seek additional funds after school site registration days by means they deem appropriate. PPIE and Parent Clubs will seek to inform each other of additional fundraising activities by contributing to a joint calendar.