



## **“Foundations for Excellence” Quality Standards for Local Education Foundations FAQ**

**Drawing on 30 years of best practices, Florida’s local education foundations have developed performance standards for members as a voluntary self-assessment and peer review process.** Specific practices in **six key areas** were identified – all with a goal of providing a strong foundation that is sustainable beyond leadership and program changes. Great care was taken to make these standards achievable by small, volunteer-driven organizations yet provide room for growth for more established, larger members. In going through the review process, CFEF members will submit evidence for meeting each standard while having ready-access to national resources and quality sample documents.

### **Why Local Education Foundations Should Participate in Foundations for Excellence Quality Standards**

- **Improved Effectiveness**—Quality standards help set consistent expectations among local education foundation boards and staff, helping to focus on areas of need and make effective use of sometimes limited time and talent.
- **Guidance for Growth Areas**—Quality standards provide a framework for documenting, communicating and providing training and technical assistance to advance best practices with support from peers and statewide membership organization.
- **Improved Function**—Local education foundations exist to serve school districts and local partners in improving K-12 education. Foundations should know that programs are effectively serving students and schools, the board is functioning in a highly-effective manner, message are mission-aligned and organizational and business practices maximize limited resources. All these things can go a long way to ensuring the foundation is doing everything it can to support the district in raising student achievement.

### **Support for Local Education Foundations**

- **Sample Documents**—The CFEF will provide vetted sample documents in every standard area that are specifically applicable to local education foundations.
- **Peer Feedback**—Leaders from peer local education foundations will provide feedback on submitted documents and ratings in the form of one-on-one consultations.

### **How Quality Standards Rating Can Be Used**

Local education foundations can share their Foundations for Excellence rating with anyone they wish—their board, the district, business partners, the wider community—but the CFEF never will. This process is meant to support member local education foundations in growing to be highly-effective organizations on common standards of excellence. Participating in this exercise and striving to continually improve processes and practices is a badge of honor we hope Florida

local education foundations can be proud of and use as a benchmark of success for their organization.

### **1. What are the Standards for?**

The Standards are designed to drive self-improvement by Florida's education foundations. This process was built by CFEF members to increase their own effectiveness. Foundations self-assess and receive a peer review to validate their ratings. Foundations use the results of the ratings to prioritize improvement strategies.

### **2. Why did the CFEF create Foundations for Excellence Quality Standards for Florida education foundations?**

CFEF members set an objective to define standards that foundations can use to guide their own self-improvement and ongoing development. The Standards are designed as a tool to guide executive directors and foundation boards as they consider the ongoing development of a foundation. Staff and volunteer leaders come to their education foundation from a variety of backgrounds and perspectives. CFEF leaders have observed that many are looking for a "road map" of policies and practices to position themselves for long-term success and sustainability. We see the Standards as a way to capture 30+ years of wisdom and experience of our network of diverse members to strengthen current and future education foundations.

### **3. How were the Standards developed?**

Once the idea to develop the Standards emerged from a CFEF leadership retreat in August 2016, all members were invited to be involved through a task force. Great effort was made to include members who represented the size and scope of the membership. The group met in person and virtually and was guided through the process by a professional facilitator with the commitment to develop standards that were both attainable by small, entirely volunteer-driven education foundations and provided growth opportunities for larger, more established organizations. After several iterations, 30 standards under six broad categories emerged along with agreement on what could provide evidence for attainment of each standard. Nine CFEF members volunteered to be in a pilot group in 2018 to try out the process and give input for further refinement.

### **4. Are CFEF members required to complete the Standards assessment process?**

Members are encouraged to complete the Standards on a regular basis. The goal is to offer peer feedback to foundations completing the Standards once every three years. While not a requirement, the Standards process will guide opportunities and activities of the CFEF.

### **5. How do I complete the Standards process?**

CFEF members access a self-assessment tool through the CFEF online grants management platform to rate themselves and submit evidence. There are three annual four-month opt-in cycles that foundations can request access to begin the Standards process online:

September 1 – December 31

January 1 – April 30

May 1 – August 31

Contact Tracy at [tracyburger@cfef.net](mailto:tracyburger@cfef.net) to request to be part of an opt-in cycle. It is expected that self-rating and evidence upload will be completed by the end of the opt-in cycle which triggers the peer-review process, completed 30 days following the cycle end.

**6. How will a foundation be evaluated against the Standards?**

Foundations will evaluate their own level of progress on individual criteria. This self-assessment will include the gathering of evidence to support the rating so that a confidential peer review can be completed. The goal is to validate and offer feedback to foundations so that they can address priorities they self-identify in the process.

**7. How will the CFEF use the results of the member assessments?**

The CFEF will be able to use the member assessments to identify priorities for CFEF-wide professional development and individualized support. New initiatives and opportunities will be tailored to support and reinforce foundations based on progress against the Standards.

**8. How will individual foundation boards and board members be involved in the Standards process?**

The level of board involvement in the Standards process is up to the executive director of each foundation. The CFEF strongly encourages the involvement of board members in the self-assessment to strengthen their understanding of foundation efforts.

**9. Who decides what happens with the Standards and the member assessments?**

The Standards and the self-assessment process have been designed by CFEF members. As a product of the CFEF, the decision-making about any changes to the use of the Standards is in control of the members and executive committee of the CFEF. The members decide.

**10. How will the CFEF support my foundation to improve against the Standards?**

The Standards tool will include examples, best practices and tools to give each foundation a clear sense of how they could improve against each standard. We are continually gathering and posting examples and references for support. Targeted group and individual professional development and consulting will be provided by the CFEF in alignment with the Standards.

### **Mission and Strategy**

An effective Florida Education Foundation has:

1. A clear mission publicly stated that is clearly connected to student success.
2. Organizational (strategic) plans that describe how current work aligns with the mission.

### **Program Quality**

An effective Florida Education Foundation includes Programs that are:

3. Responsive to local needs and/or aligned with school district priorities.
4. Aligned with mission.
5. Demonstrate impact through clear measurement.
6. Cost-effective.

### **Board and Leadership**

Local Education Foundations in Florida have:

7. Roles for board members and CEO clearly defined in writing.
8. Board members are successfully recruited to maintain participation and engagement with the organization.
9. Regular reviews of Board performance.
10. Regular reviews of CEO performance.
11. Clear orientation for Board members.
12. Ongoing learning and development in place for board and CEO.
13. Broad-based board membership enabling deliberations among Board and CEO on substantive matters for the improvement of the Foundation.

### **Fundraising and Sustainability**

In order to support an Education Foundation:

14. Effective donor relations and communication are in place.
15. Annual fund development plans guide fundraising activities.
16. There are clear roles for Board and staff in fundraising.
17. Leadership makes efforts to diversify revenue sources.
18. Long term relationships and infrastructure for sustaining donors over time are built including consideration of options for planned giving and endowments.

### **Partnerships, Public Awareness and Engagement**

Foundations must be oriented and connected towards the broader community by:

19. Effectively working with the local school district on aligned efforts.
20. Connecting to other relevant local partners and business and community for relationship building and ongoing program connections.
21. Building an identifiable brand and independent identity that is promoted in the community.
22. Aligning messages from the foundation with mission and programs.
23. Following clear policies and procedures for advocacy and connection to official decision making (school board, legislature)

### **Effective Business and Organizational Operations**

Education Foundations operate effectively as demonstrated by building:

24. A clearly defined working relationship with the school district.
25. Procedures for compliance with Federal, State and Local requirements and policies.
26. A budget that pays for insurance for directors, programs and organizational liability.
27. Internal controls that meet industry standards for financial and operational management.
28. A leadership succession plan.
29. Clear policies for staff salary and benefits appropriate for local context.
30. An annual budget – approved by the board – including an established policy on operational reserve.