



photo by: Dana Love



A MESSAGE



On behalf of the board and staff of the Carlsbad Educational Foundation (CEF), we are pleased to share this annual report with the community. The 2011 fiscal year marks our 28th year as a local education foundation serving the Carlsbad community and enriching the education of its students. Our role is to help raise private support for programs that help promote educational excellence for the 11,000 students in the Carlsbad Unified School District.

As our theme for this year's annual report, "excellence" is what we strive to promote for our local students. Working closely with a variety of community partners—business leaders, community members, elected officials, school administrators and philanthropists as well as parents and volunteers—CEF helps harness the generosity of the Carlsbad community and translates it into tangible programs making a real impact on the education of our students.

During the 2010-2011 school year, due in large part to the generosity of our local community, the Carlsbad Educational Foundation was able to make significant contributions through targeted funding for programs like:

- Weekly, high-quality music instruction across all nine elementary schools, impacting nearly 5,000 elementary school students throughout the year;
- Hands-on, invigorating opportunities for students to engage in science and technology through the FIRST LEGO League robotics program and international Science Olympiad program as well as enhanced middle school and high school science labs, and more;
- Financial literacy and learning about the economy by enabling every CUSD fifth grader to participate in the BizTown program (co-funded by the Carlsbad Chamber of Commerce), in addition to partnerships with the Lux Art Institute, and more!

We raise funds for these programs from two main sources: CEF-run programs and community donations. The revenue generated from CEF's district-wide Kids' Care after-school daycare program is one of our largest sources of funds.



FROM THE CEO AND PRESIDENT OF THE BOARD



We were also proud to launch the pilot year of our first-ever CEF Summer Academy, offering advancement classes and credit for incoming 9th-to-12th graders in a variety of core classes.

In the past year, CEF also launched a brand new website to better tell our story. Combined with new social media outlets such as a Facebook page and YouTube channel, we now have the ability to showcase the programs impacting our students. We are truly excited to offer these tools as a way for the local community to learn about and really see these programs in action. Please check them out through the links you will find at www.CarlsbadEd.org.

Having recently developed a new three-year strategic plan, CEF continues to grow and has set a lofty goal for the next few years—to double our grant-making impact in the Carlsbad community from approximately \$500,000 per year to \$1M per year by 2014!

If you are not already involved with CEF, please consider becoming a part of our future impact in Carlsbad. Thank you for your interest and support of more than 11,000 students in the Carlsbad Unified School District!

SINCERELY

**Valin
Brown**

Chief Executive Officer



**R. Emmett
Durnan**

Chairman of the Board

CARLSBAD EDUCATIONAL FOUNDATION





Where Kids Are Worth A Million™

OUR
LEADERSHIP
VISION



The Carlsbad Educational
Foundation **WILL PROMOTE**
Carlsbad's student achievement
of educational **EXCELLENCE.**

The Foundation will...

-  Fund, develop and evaluate impact-oriented, well-defined, district-wide programs that enhance the overall educational achievement of all students.
-  Achieve significant growth in the Foundation's resource development efforts with an emphasis on diverse and sustainable revenue.
-  Promote broad awareness and recognition of the Foundation as a leader in Carlsbad through targeted branding and marketing efforts.
-  Uphold a highly accountable and efficient set of business operations.

OUR MISSION

TO SUPPORT THE EDUCATION OF EVERY CHILD IN THE CARLSBAD UNIFIED SCHOOL DISTRICT BY DEVELOPING, CONDUCTING AND FINANCING INNOVATIVE AND QUALITY PROGRAMS AND PROJECTS.

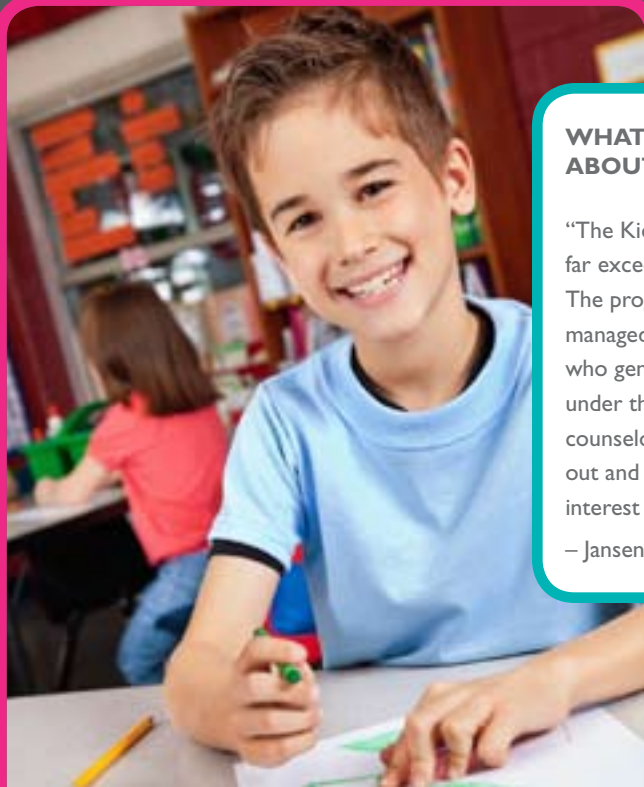
KIDS' CARE

An Enrichment Program of the Carlsbad Educational Foundation

- WHAT:** Kids' Care, a high-quality, licensed child care and educational enrichment program, providing safe, convenient, before and after school care
- WHO:** Kindergarten through 5th grade students
- WHERE:** On campus- all 9 CUSD elementary schools
- WHEN:** Daily from 7:00 a.m. to 6:25 p.m., when school is in session, during most school holidays and during the summer
- HOW MUCH:** From \$120 up to \$495 per month. After school care from 2:30 – 6:25 p.m. is \$335 per month.

HIGHLIGHTS...

- Enrichment including science, art, cooking, gardening, soccer and much, much more
- A half-day Kindergarten + a half-day of Kids' Care = a full day of learning
- Kindergarten students are escorted to the program
- Computers for students to work on school projects
- Homework Club Monday - Thursday
- Safe and incredibly convenient - students never leave campus
- Extremely competitive rates



WHAT PARENTS SAY ABOUT KIDS' CARE

"The Kids' Care program has far exceeded our expectations. The program is well designed and managed by awesome counselors who genuinely care for the children under their care. The activities the counselors plan are well thought out and always have the children's interest in mind."

– Jansen and Teddi Buckner (BV)



KEY FACTS

Results from the recent Kids' Care parent satisfaction survey:

- Over 90% of parents indicated a high level of overall satisfaction with the Kids' Care program.
- Over 92% of parents say they feel that Kids' Care is a safe place for their children.
- Over 93% of parents responded that Kids' Care has a friendly and welcoming atmosphere.

Visit www.CarlsbadEd.org, or call (760) 929-1555 to learn more or to enroll your child today!

2010 - 2011

EDUCATIONAL IMPACT...

With California ranking 43rd out of 50 U.S. states in per-pupil funding for public education*, the work of the Carlsbad Educational Foundation is critical to supporting our local students. We are proud to support student achievement with the following grants made to the Carlsbad Unified School District in 2010 – 2011:

*according to Education Week's EPE Research Center, 2010

\$3,000

for science enrichment for Kids' Care students with the support of a grant from the City of Carlsbad.

\$5,000

to help fund the cost of every fifth grader attending Junior Achievement's BizTown program.

\$5,000

to fund the cost of every sixth grader participating in the Lux Art Institute's "Valise Project".

\$8,700

for new recorders and multicultural drums at each elementary school.

\$15,000

for new and engaging supplies for all three middle schools' science labs for more hands-on experiments with the support of a donation from ViaSat, Inc.

\$17,000

for new computers for the science department at Carlsbad High School along with other critical science lab upgrades.

A NOTE FROM SUPERINTENDENT DR. JOHN ROACH

The Carlsbad Educational Foundation (CEF) has been a strong supporter of our nine elementary, three middle and one high school for decades. At no time in our District's partnership with this wonderful organization has its support been more needed and more valued than now, when we face an anticipated \$2.4 million budget shortfall in school year 2012-13 and a possibly worsening deficit in 2013-14.

Each year, the CEF provides nearly \$0.5 million of funding in support of our students, teachers and schools; enabling us to offer programs beyond what state dollars can provide. Recent CEF grants have supported weekly elementary school music classes in this art form that has been linked to student achievement. Grants also have funded a wealth of science instruction, learning activities and other programs.

Carlsbad Unified School District has pledged, as our mission states, to guarantee that all of our 11,000 students flourish in life as enthusiastic, confident learners through a world-class educational system. The money the CEF raises and contributes to the District helps us fulfill this mission and helps students learn the 21st-century skills and technology they will need to succeed in college, career and life. We are grateful.



John A. Roach, Ed.D. Superintendent

\$17,800

for the Science Olympiad program at all three middle schools & Carlsbad High School funded, in part, by the Beckman Coulter Foundation & the McCarthy Family Foundation.

\$28,000

in funds given directly to local schools for programs at their discretion. Funded by ticket sales from the "Celebrate Carlsbad Day" event or school-based grantwriting.

\$32,400

in funds to the CHSTV student broadcasting program at Carlsbad High School funded by a donation from the Leichtag Foundation.

\$55,000

for a FIRST LEGO League Robotics team or club at every school with the support of a grant from the Life Technologies Foundation.

\$83,500

in year-end grants and other distributions to support CUSD, including designated donations and facility fees.

\$208,000

in funding for district-wide music at all nine elementary schools for weekly core music classes.



TOTAL IMPACT:
\$478,400
for 2010 - 2011!



2010
2011

FUNDING SUPPORT TO THE CARLSBAD EDUCATIONAL FOUNDATION WAS GENEROUSLY PROVIDED BY:

Foundations & Others

Beckman Coulter Foundation
Carlsbad Charitable Foundation
Carlsbad Hi Noon Rotary
Life Technologies Foundation
McCarthy Family Foundation
Mission Federal Credit Union
Community Foundation
Nordson Corporation Foundation
Samuel H French III and Katherine
Weaver French Fund
Smith Walker Foundation
The Charitable Foundation
(Prudential California Realty)
The William & Ruth Tippett Foundation
United Way of the Inland Valleys
Wells Fargo Foundation

Corporate

AutoClaimsDirect
Barnhart Balfour Construction
Branded 360
Bressi Ranch Self Storage
Brickman Group
BW Research Partnership Inc.
California Financial Services
Carlsbad Firefighters Association L3730
Carlsbad Police Officers Association
Cars for Causes
Competitor Group, Inc
Construction Testing & Engineering, Inc
Consulting & Inspection Services, LLC
Dannis Woliver Kelly
Eric Hall & Associates
Fagen, Friedman & Fulfroost LLP
Farley & Associates, LLC DBA
Knockout Pizzeria
Ferguson Salon Management, Inc.
Fit Kids America
Flatiron West, Inc
Flippin5 La Costa, LLC
Gafcon, Inc
Gilchrist, Stanfield, Newquist & Adler
Heidi Piron Design & Cabinetry, LLC
Hetzl Meade Communications
Hoehn Motors, Inc

Houghton Mifflin Harcourt
Jazzercise, Inc
Johnson & Wood Insurance
KAAM Group, Inc.
Ken Grody Ford
Kendal Floral Supply, Inc
Kiwanis Club of Carlsbad
La Costa Resort & Spa
La Costa Coffee Roasting Company
LEGOLAND California
Lexus Carlsbad
Lexus Pursuit of Potential
Life Technologies
Linda's Yogurt & Deli
Lot 15 Carlsbad Ranch, LLC
Lowe's
Macy's Inc
McCarthy Building Companies
Morrison Insurance Services, Inc
NGS, LLP
Optimist Club of Carlsbad
Pickle's Café and Deli
Piper Jaffray & Co.
Point Loma Credit Union
Port Brewing Company
Roelsing Nakamura Terada Architects Inc
Roto Rooter
Siemens Industry, Inc.
Stone Brewing Company
Sunwest Bank
TD Ameritrade
Team Van Siclen
The Blind Squirrel
The Den Apparel, LLC
The Lund Team
Togo's Carlsbad
Toyota Carlsbad
Toyota Dealer Match Program
Tri-City Medical Center
Waste Management
Westfield Plaza Camino Real
Consulting & Inspection Services, LLC
Williams & Sewell HR Consulting

Individual

Jennifer Adams

Scott and Merri Adams
Steve and Deborah Ahle
Hiroko Ambo
Sandra Aguilar and Chuck Tyson
Kim and Harry Arnett
Doug and Julie Baker
Bruce and Kelly Bandemer
Patricia Barbera
Steve Barker
Beverly Batchelder
Terri Bates
Melissa Bejer
Keith and Dawn Blackburn
Jerome H. Bonot
George F. Boone, M.D.
Tami Brennan
Dan and Bobbie Brown
Valin and Diane Brown
Kimberly Bucklew
April Byron
Allyson Callahan
Karyn Casel
Michelle Ceng
Jose and Jennifer Cervantes
Bryan Chandler
Denise and Gary Chapman
Jay Chiang
Mabel Chung
David and Kasey Cinciarelli
Keith and Amanda Clardy
Airlie Cooper
Jaime Crawford
Patricia and James Downs
David Daul
John-Bryan Davis and David Milroy
Mary Davis
Carol Davidson
Jose and Isabel De Anda
Melina Diaz
Patrick Dillon
Valerie DiSalvio
Emmett and Chris Durnan
David Edwards
Jerry and Patricia Einfalt
Tim Evanson
Gary and Valda Flynn
Jeff Fogel
Patrick and Michelle Fourmont

Curtis W. Fox
Todd and Amy Fraser
Jeff and Laryssa Freeman
Robert and Cheryl Freeman
Anthony Franchimone
Marilynn Gallagher
Tina and Dana Genovese
Lisa Giambra
Matt and Michelle Ginn
Jean Goddard
Anju Grover
Kevin and Joanne Hackett
Mark and Kathy Hahn
Melisa Hall
Christian Hamme
Michael and Joy Hanawa
Dan Haun and Anne Bailey
Susanne Hays
Randy Hoffius
Matt Huffman
Patrick and Kelly Hurley
Michael Hutchens
Maria C. Ikedo
David and Jamie Irvine
Bob and Jenifer Jaffe
Kimberley Janson
Didier Jantz
Jeff and Patty Johnson
Monica Johnson
Gary Kawano
Carla Kelley
Dave Klenske
Wendy Klute
Sam J. Kmety
Danielle Komadina
Elissa Kuznik
Eva Leahy
Kimberly and James Ledford
Mildred Lakusta
Julie Less
Valerie Lusk
Peter Meade and Sue Hetzel Meade
Michele McClowry
Tracey McGowan
Paula McKinney
Marc and Tamara Moody
Rob and Linda Moynan
Shar Nigma

Tom and Michelle Nirschl
Julie O'Gorman
Audra Osburn
Ayse Ozcayir
Lisa Parks
Guy and Yolanda Patterson
Philippe and Liza Peluso
Jolene Pichler
Michael Popovich
Lisa Potter
Joe Potts
Tm and Lori Powers
Ron Pregmon
Norma C. Rathgaber
John and Johanna Roach
Colin Ross
Tim and Shelly Royalty
Mitzi Ruff
Mike Ruppert
Paul and Saori Russell
Greg Sabella
Patrick Sanchez
Joel Schmidt
Debbie Schoessow
Mark Sheldone
Tony Scibilia
David Silva
Rachel Staats
Mary Stately
Mary Steely
Jerry Stephenson
Shawna Straw
Tracy Sundlun
Maria Theilgard
Jill Thomas
Jackie Tortoriello
Tammy Trautt
Jon Ulrich
Carol and Paul Van Vooren
Rita Valverde
Dongjie Want
Julia Weldy
Emily Wheatley
Bernard Whitley
Knox and June Williams
Veronica Williams
Denise Wyatt

2010 2011 AUDITED FINANCIAL PROFILE






Revenue & Support

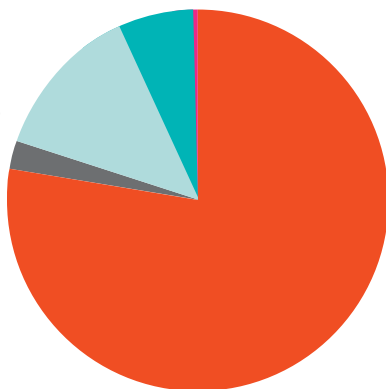
Tuition & Fees	\$1,702,793
Contributions	\$56,749
Grants	\$286,036
Special Events (net)	\$155,967
Interest Income	\$2,633
Bad Debts	(\$25,292)
Total Revenues:	\$2,178,886

Expenses




Program Services	\$1,964,707
Management & General	\$103,834
Fundraising	\$107,768
Total Expenses:	\$2,176,309
Change in Net Assets:	\$2,577
Net Assets at Beginning of Year:	\$576,366
Net Assets at End of Year:	\$578,943

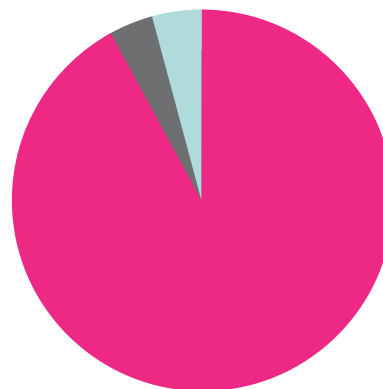
REVENUE

-  Tuition & Fees 77%
-  Grants 13%
-  Special Events 7%
-  Contributions 3%
-  Interest 0%



EXPENSES

-  Program Services 90%
-  Fundraising 5%
-  Management & General 5%



2010-2011 OFFICERS
OF THE BOARD

Emmett Durnan
Chairman
Westfield Mission Valley

Linda Moynan
Vice President
Community Member

Tami J. Brennan, CPA
Treasurer
CEA, LLP

Sue Hetzel Meade
Secretary
Hetzel Meade Communications

2010-2011 MEMBERS
OF THE BOARD

Julie Baker
Carlsbad Planning Commission

Bart Blechschmidt
Galuppo & Blechschmidt, APLC

Denise Chapman
La Costa Resort and Spa

Amanda Clardy
Life Technologies

Todd Fraser
TaylorMade Adidas Golf Company

Michelle Ginn
Community Leader

Randy Hoffius
Branded 360

Pat Hurley
Marrs Maddocks & Associates

Dave Irvine
ViaSat Inc.

Tyson Lund
The Lund Team Inc.

Marc Moody
Gillespie Moody Patterson, Inc.

Colin Ross
SEA LIFE Aquarium at
LEGOLAND California

Tim Royalty
Real Estate Investor

Laura Segall
Prudential California Realty

Carol Van Vooren, Ed.D.
Cal State San Marcos

CARLSBAD EDUCATIONAL
FOUNDATION STAFF

Valin Brown
Chief Executive Officer

Jose E. De Anda
Director of Kids' Care

Cheryl Freeman
Administrative Assistant

Patty Johnson
Director of Development

Paula McKinney
Staff Accountant

KIDS' CARE
SITE DIRECTORS

Regina Fleury
Magnolia Elementary

Sandy Haasis
Jefferson Elementary

Melisa Montez
Poinsettia Elementary

Shari Passen
Calavera Hills Elementary

Ashley Schwartz
Aviara Oaks Elementary

Maya Shropshire
Hope Elementary

Rachel Tamayo
Kelly Elementary

Mark Todd
Buena Vista Elementary

Georgiana Toso-Lapp
Pacific Rim Elementary

2010
2011
BOARD & STAFF

- Make a donation.
- Volunteer to be part of one of our programs or help with one of our special events.
- Help spread the word about the Foundation and our efforts to fund educational excellence in our schools.

For more information about the Carlsbad Educational Foundation or to make a donation, please visit www.CarlsbadEd.org or call us at (760) 929-1555.

DID YOU KNOW



100% OF YOUR DONATION TO CEF—EVERY SINGLE DOLLAR—GOES TO PROGRAM FUNDING. OUR EARNED INCOME PROGRAMS SUPPORT OUR BASIC OPERATING COSTS.

In addition to investing nearly \$500,000 in targeted grants through programs that benefit the more than 11,000 students in the Carlsbad Unified School District, the Carlsbad Educational Foundation also operates three distinct programs that serve our community. These programs meet several needs of local families while earning income that helps cover nearly all the foundation's operating costs. As a result, every donation made to the CEF is able to help support grants directly benefiting our students!

CEF SUMMER ACADEMY FOR HIGH SCHOOL STUDENTS

CEF is sponsoring its second year of summer classes for advancement credit for incoming students in grades 9 through 12. The CEF Summer Academy program offers a variety of courses for advancement during an intensive 3- to 6-week session between June 19 and July 27. Full class schedules and registration materials are available at www.CEFAcademy.org.

SUMMER ENRICHMENT PROGRAM FOR K-8 STUDENTS

CEF operates a fun and enriching series of half-day camps each June–July, offering nearly 50 programs designed specifically to inspire and teach students ages 5 to 14 in the areas of science, music, technology and the arts. Class and registration materials are available at www.CEFAcademy.org.

KIDS' CARE FOR K-5 STUDENTS

Operating since 1990 at every CUSD elementary school, CEF's Kids' Care offers a high-quality licensed childcare and educational enrichment program that provides safe, convenient, before and after school care for nearly 700 K-5 students each day. Registration is open year-round and more information can be found at www.CarlsbadEd.org.

<<HELP US MAKE AN IMPACT!



Carlsbad Educational Foundation
Where Kids Are Worth a Million™

5631 Palmer Way, Suite L • Carlsbad, CA 92010 • 760•929•1555

CARLSBADED.ORG

 **ideaworks** advertising
marketing & creative strategy