



CARLSBAD EDUCATIONAL FOUNDATION  
ANNUAL REPORT 2012



O P P O R T U N I T Y

# 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 – 2012 fiscal year marks our 29th 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.

Our theme for this year's annual report, "Opportunity," is really what resonates most when people ask us about our purpose. From kindergarten through high school seniors, we grant funds to the district that create opportunities and make a difference in the lives of our students. Many, if not all, of CEF's funded programs simply would not exist for our K-12 students without private support.

With the economy slow to rebound and challenging state budget cuts to education, our schools must find new and creative ways to weather the storm. While painful cuts were made to balance the District's budget, the Carlsbad Educational Foundation continues to attract new funders who are helping us create new and exciting educational opportunities.

For example, CEF recently launched a privately funded science lab Teacher's Assistant at the high school and several "traveling" science lab teachers for 4th and 5th graders. These credentialed teachers will play a pivotal role in bringing science to life for our students through hands-on coursework.

Similarly, the "MY ACCESS" English-writing software (first piloted at Aviara Oaks Middle School) now has been expanded to all three middle schools with a pilot underway this year at Carlsbad High. This program gives teachers an innovative new tool for empowering students with the opportunities to write more frequently, receive immediate feedback and attain higher-level writing proficiency.



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 successfully harnesses the generosity of the Carlsbad community and translates it into tangible programs that make a real impact on the education of our students.

Our commitments remain firm for several of our other grant-funded programs, including weekly K-5 music, FIRST LEGO League and FIRST Tech Challenge Robotics, Science Olympiad, BizTown and many more. We are able to retain many of these important programs due to the generosity of corporate partners and, in part, to funds raised through our direct service programs, such as Kids' Care, Summer Enrichment and High School Summer Academy.

If you are not already involved with CEF, we hope you will consider becoming 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



**Pat  
Hurley**

Chairman of the Board

# CARLSBAD EDUCATIONAL FOUNDATION

*Where Kids Are Worth A Million™*

OUR  
VISION



Investing in Our Children's

## FUTURE

through Excellence in Education.

**K-5 Music Teachers**

**Science Lab Supercharge**

**Science Lab Teachers**

**FIRST LEGO® League & FIRST Tech Challenge Robotics**

**Lux Art Institute's "Valise Project"**

**Junior Achievement BizTown™**

**Science Olympiad**

**"Third Grade Academy" at the Discovery Center**

**My Access® Web-based Writing Instruction**

iPad Pilot Project

**International Baccalaureate (IB) Program...**and much much more!

## OUR MISSION

TO PROVIDE INCREASED EDUCATIONAL OPPORTUNITIES FOR ALL STUDENTS IN THE CARLSBAD UNIFIED SCHOOL DISTRICT BY DEVELOPING AND FUNDING IMPACTFUL PROGRAMS.



# 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 at 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

## 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.



### A MESSAGE FROM JOSE DE ANDA, DIRECTOR OF KIDS' CARE

In addition to caring for over 700 students, 2012 featured a collaborative partnership with Carlsbad High School students to provide homework and activity assistance in our Kids' Care programming in return for community service hours.



### 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 (BY)

2011 - 2012

# EDUCATIONAL IMPACT...

Due to recent funding cuts, the Carlsbad Unified School District now ranks LAST out of all 42 school districts in San Diego County in per-pupil funding for public education. The work of the Carlsbad Educational Foundation is more critical than ever in supporting our local students.

**\$2,500**

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

**\$3,871**

in restricted donations for memorial funds.

**\$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."

**\$5,000**

to help sustain the International Baccalaureate (IB) program at Jefferson Elementary School.

**\$5,500**

for curriculum and materials at each elementary school to augment the K-5 music program, through a partial grant from The (Prudential) Charitable Foundation.

**\$6,094**

for the Carlsbad Kids Go Green recycling and zero-waste programs at Kelly and Magnolia schools through a donation from the Carlsbad Charitable Foundation.

**\$7,000**

for technology and assistance to the CHS Speech and Debate program through a restricted donor gift.

**\$7,800**

for the maintenance and "tune-up" of science lab equipment at all middle schools and CHS, with generous donations from Life Technologies and Vertex Pharmaceuticals.

**\$10,389**

for tuition-assistance scholarships to CEF's Kids' Care and summer program participants.

**\$14,437**

for the Science Olympiad program at all three middle schools and Carlsbad High School funded by ViaSat and the Beckman Coulter Foundation.

**\$15,000**

for new and engaging supplies for all three middle schools' science labs for more hands-on experiments with the support of donations from the McCarthy Family Foundation and Nordson Corporation Foundation.

## A NOTE FROM SUPERINTENDENT SUZETTE LOVELY

A defining characteristic of a successful school district is the use of partnerships to strengthen student outcomes. Since 1983, the Carlsbad Educational Foundation has worked hand-in-hand with administrators, teachers, parents, and the local business community to leverage collaboration for the benefit of all students. As a vital partner to CUSD, the fundraising efforts of CEF complement and enhance our learning mission.

Successive years of shrinking state revenues have made it difficult for our District to offer many of the enrichment and supplemental programs provided in the past. However, with CEF's ability to raise nearly \$500K last year, students received elementary music instruction, science equipment and consumables, robotics classes, field trips, and technology devices. To continue these opportunities for students to innovate, collaborate, and communicate, the foundation needs our help.

There's an old adage in the world of fundraising: People don't give based on someone's need to have; they give based on their need to give. To that end, the Foundation and its Board of Directors have engaged in a thoughtful process to determine the interests of donors and match these interests with the needs of our schools. With a clearly defined mission and aligned annual goals, CEF provides a variety of tools for K-12 students to reach their full potential. This reciprocal partnership among the school district, CEF, and the business community contributes to our universal goal that every student will leave high school/college and career-ready.



Suzette Lovely, Superintendent

**\$28,442**

in funds given directly to local schools for programs at their discretion. Funded by ticket sales from the "Celebrate Carlsbad Day" at LEGOLAND® event and school-based grant-writing.

**\$30,000**

to the Third Grade Academy for Environmental Stewardship at the Agua Hedionda Lagoon Foundation from a grant from the Carlsbad Charitable Foundation.

**\$46,671**

for a FIRST LEGO League and FIRST Tech Challenge Robotics team or club at every school in part through grants from Nordson Corporation and San Diego Gas & Electric.

**\$51,366**

in funds to the CHSTV student broadcasting programs at Carlsbad High School funded by donations from the Leichtag Foundation.

**\$92,346**

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

**\$155,000**

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



TOTAL IMPACT:  
**\$491,416**  
for 2011 - 2012!

**Foundations & Others**

Abbott Fund  
Beckman Coulter Foundation  
The Beveridge Family Foundation  
Blackburn Foundation  
Carlsbad Charitable Foundation  
Carlsbad Firefighters Association  
L3730  
Carlsbad Hi-Noon Rotary  
Carlsbad Police Officers Association  
The Charitable Foundation  
City of Carlsbad  
Eli Lilly and Company Foundation, Inc  
Judy & Bernard Briskin Charitable  
Foundation  
Kiwanis Club of Carlsbad  
Life Technologies Foundation  
The Lloyd E. and Elisabeth H. Klein  
Family Foundation  
McCarthy Family Foundation  
Nordson Corporation Foundation  
Qualcomm Charitable Foundation  
The San Diego Foundation  
Smith Walker Foundation  
Wells Fargo Foundation

**Corporate**

Able Heating & Air Conditioning, Inc.  
ABM Services, Inc.  
Aethercomm  
Allen's New York Pizza  
Barnhart, Balfour, Beatty  
Beach City Smoothies  
Bella D'Ora, Inc  
Brady Company San Diego, Inc.  
Briad Restaurant Group, LLC  
Brickman Group  
Brinker International DBA Chili's  
Grill & Bar  
BW Research Partnership Inc.  
Carlsbad Bakery, LLC, dba Corner  
Bakery Cafe  
Carlsbad Village Auto Body, Inc  
CEA, LL<sup>3</sup>  
Challenger Sheet Metal, Inc  
Clothing Cottage  
Competitor Group, Inc  
Digital Networks Group, Inc  
Don's Country Kitchen  
El Puerto Mexican & Seafood  
Eric Hall & Associates  
Fagen, Friedman & Fulfrost LLP  
Fairen Del, Inc.  
Ferguson Salon Management, Inc.  
Fish & Richardson  
Fresco's Trattoria Bar  
Gafcon, Inc  
Galuppc & Blechschmidt, APLC  
Gems of La Costa  
Gen-Probe Incorporated  
Gould Electric, Inc.  
The Grand Deli  
Hetzel Meade Communications  
Houghton Mifflin Harcourt  
It's Academic Inc.  
Jazzercise, Inc  
KAAM Group, Inc.  
Kings Glass  
La Costa Resort & Spa  
LEGOLAND California  
Lexus Carlsbad  
Lexus Pursuit of Potential  
Life Technologies  
Lola's 7-Up Market & Deli  
The Lund Team  
Marcus Allen Consulting, Inc.  
McCarthy Building Companies  
Menchie's  
Millipore

Morrison Insurance Service Inc.  
MRM  
New Dimension Masonry, Inc  
Piper Jaffray  
PlayWerx  
Regent's Bank  
Rockwell Collins  
Roto Rooter  
Rudy's Taco Shop  
San Diego Gas & Electric  
Siemens Industry, Inc.  
Skylar's Home & Patio  
Spreebird  
Taylor Made Golf Co., Inc  
TD Ameritrade  
Teradata Corporation  
Time Warner Cable  
Tri-City Medical Center  
Vertex Pharmaceuticals Incorporated  
ViaSat, Inc  
Vigilucci's Restaurants Group Inc.  
The Village Grille  
Waste Management  
Westfield LLC  
Williams & Sewell HR Consulting  
Xtreme Frozen Yogurt  
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Boyd DeMille  
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Priscilla Denby  
Mid and Snow Deng  
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Michael Ecker  
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Meei-chun Gau  
Shaе Geary  
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Karim Gitesatani  
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Jaxson Hickerson  
Jordan Hickerson  
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Jeannette Hill  
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Brian Kingston  
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John Michael and Carolyn M. Sinai  
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 Shawna Straw  
 Carl and Jean Streicher  
 Nick Stridsberg  
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 Gaylor and Larry Tinnerstet  
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 Kathy Torres  
 Deborah M. Towers  
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 Tammy Truatt  
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 Carol and Paul Van Vooren  
 Jose and Roxanne Vega  
 Shawn and Jacquilyn Ventrom  
 Julie Vinzinski  
 Jenee Wagner  
 Becky Walker  
 Leslie Walker  
 Bill and Pam Walls  
 Adam and Savannah Wand  
 Patrick and Jill Ward  
 Jeff Waterbury  
 David Watt  
 Julia Weldy  
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 Ann W. Wentink  
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 Jim and Mary Beth Woulfe  
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 Emmy Yonemura  
 Denise Young  
 Michael J. Young  
 Tracy B. Young  
 Susan Zaks  
 Paul Zavidniak  
**In Kind**  
 CEA, LLP  
 Chef DK Catering  
 Merrill Brown  
 Peter Meade  
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# 2011 2012

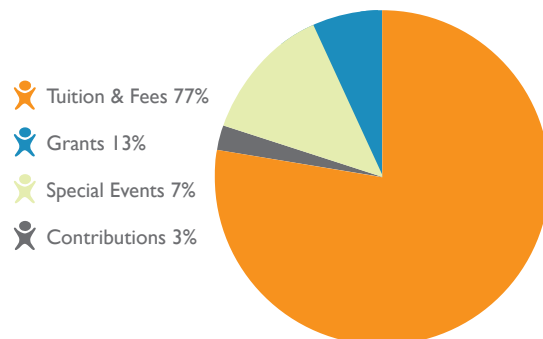
## Revenue & Support

Tuition & Fees	\$1,969,635
Contributions	\$149,408
Grants	\$324,337
Special Events (net)	\$149,051
Interest Income	\$1,865
Bad Debts	(\$20,530)
<b>Total Revenues:</b>	<b>\$2,573,766</b>

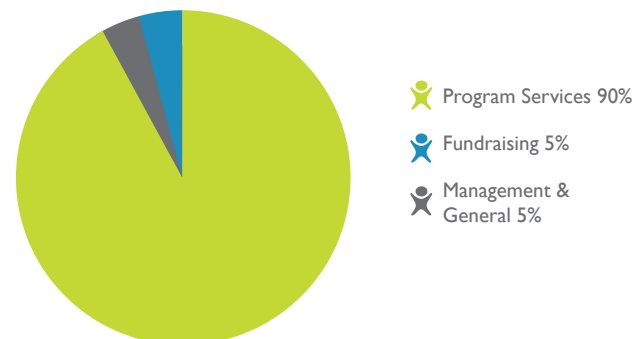
## Expenses

Program Services	\$2,354,939
Management & General	\$114,998
Fundraising	\$129,884
<b>Total Expenses:</b>	<b>\$2,599,821</b>
<b>Change in Net Assets:</b>	<b>(\$26,055)</b>
Net Assets at Beginning of Year:	\$578,943
Net Assets at End of Year:	\$552,888

## REVENUE



## EXPENSES



\* Carlsbad Educational Foundation changed the end of its fiscal year from June 30th to August 31st, resulting in a fourteen month audit spanning July 2011 through August 2012. CEF typically operates at a loss during those two months, so although the 12 months ending 6/30/12 ended in a modest positive change in net assets (not shown), the addition of a one-time two-month period resulted in the negative change in net assets reported in our audit.

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OF THE BOARD

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Special Programs Manager

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Grant Writer

**Deborah Coleman**  
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KIDS' CARE  
SITE DIRECTORS

**Regina Fleury**  
Magnolia 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

**Samara White**  
Poinsettia Elementary

2011  
2012  
BOARD & STAFF

HELP US MAKE  
AN IMPACT!

- Make a donation and make a difference for over 11,000 Carlsbad kids!
- 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.

To learn more about the Carlsbad Educational Foundation or to make a donation, visit [carlsbaded.org](http://carlsbaded.org) and



# DID YOU KNOW



As part of a national competition, with over 140,000 votes cast and competing with over 20 other finalists from around the country, CEF's district-wide robotics coordinator Anna Lozar was honored with the "People's Choice Award" in the Time Warner Cable's Connect A Million Minds *Super Connector Search*. Anna's award garnered a \$15,000 donation to CEF from Time Warner Cable.



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 third 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 18 and July 26.

## SUMMER ENRICHMENT PROGRAM FOR K-8 STUDENTS

CEF operates a fun and enriching series of half-day camps each June–July, offering nearly 60 programs designed specifically to inspire and teach students ages 5 to 14 in the areas of science, music, technology and the arts.

## 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](http://www.CarlsbadEd.org).



Carlsbad Educational Foundation  
Where Kids Are Worth a Million™



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