



Medway Foundation For Education

Investing IN OUR Future

Foundation Proposal

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Scope

The Medway Foundation for Education (MFE) has been established to help solve the ongoing dilemma between cost and quality education. The objective is for MFE to preserve our community's vitality by supporting the **centerpiece** of Medway, **our schools**. Our schools are the single most important feature of Medway, which supports our quality of life and maintains our property values.

“MFE will preserve our community's vitality by supporting the centerpiece of Medway, our schools.”

The substantial growth of Medway has resulted in an increase in capital expenditures for funding projects that are vital to providing adequate services to our growing community (i.e., new high school). These capital projects, and others to come, will continue to increase our taxes. Although residential growth does result in additional tax revenue, this revenue is more than offset by the increase cost of services required for a new household with school-aged children. While our property taxes continue to increase, our school budget largely remains the same. If we do not take action now, the inevitable result is program cuts and staff reductions.

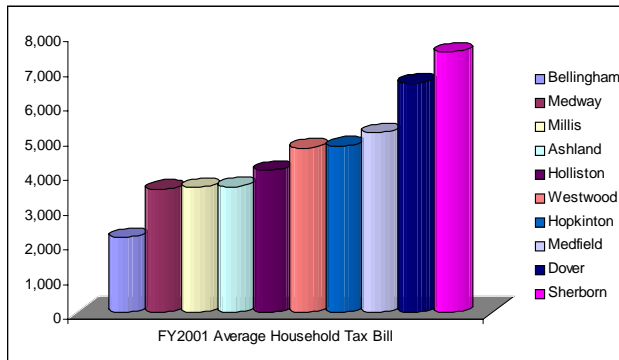
By taking a proactive approach, MFE would be positioned to fund more creative ways to provide richness and depth to education for our children. Contributions to MFE will be focused on preserving and improving our quality education by reducing the impact of limited school budget funding.

Situation

The town of Medway's reputation as an attractive town to raise and educate children has resulted in tremendous growth over the past 10 years. The latest census data indicating 25.34% increase in population since 1990 and of that population, over 31% of the residents are under the age of 18. Many factors contribute the population increase including housing affordability, sense of community and open space, good standing in MCAS, access to major highways as well as the proximity to many affluent Massachusetts towns. But most important to families is the commitment to excellence in public education as reflected by our MCAS scores and quality teachers and schools.

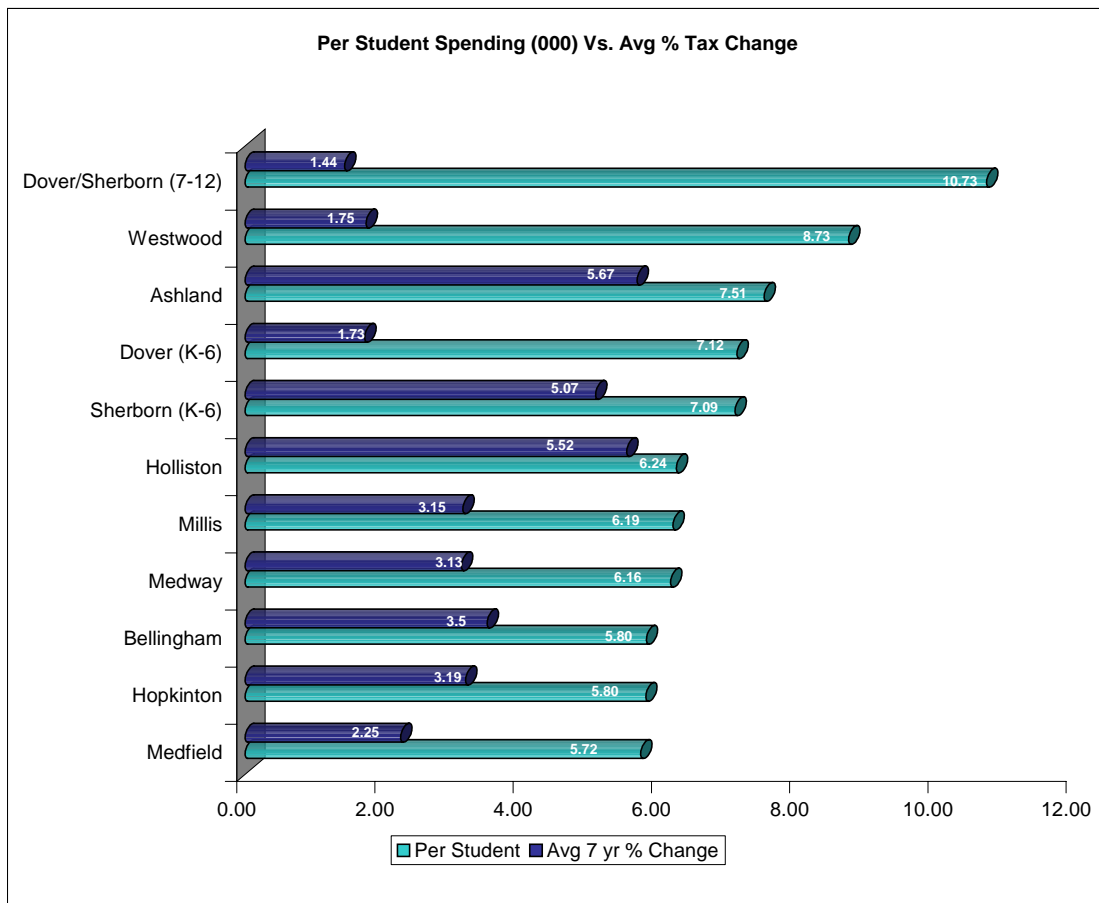
	Total Population 1990	Total Population 2000	% Change	% Under 18 - 2000
Bellingham	14,877	15,314	2.94	26.84
Millis	7,613	7,902	3.80	26.93
Sherborn	3,989	4,200	5.29	31.88
Natick	30,510	32,170	5.44	23.01
Holliston	12,926	13,801	6.77	30.01
Westwood	12,557	14,117	12.42	27.82
Dover	4,915	5,558	13.08	31.56
Medfield	10,531	12,273	16.54	33.59
Ashland	12,066	14,674	21.61	25.26
Medway	9,931	12,448	25.34	31.85
Hopkinton	9,191	13,346	45.21	33.10

As expected, this growth has placed a tremendous burden on the Medway school district in the form of increased class sizes with virtually no spending available for capital improvements. Most importantly, this growth has increased the risk of failure in providing a quality education to the students of Medway.



With no increase in school budget funding and an increasing number of students entering the system, the results are evident. The property taxes per household increased on average slightly over 3% for the past 7 years and our per student expenditures continue to place us lower compared to surrounding towns with similar demographics. Sources of funds for education have been stretched beyond the breaking point and we are now experiencing restrictions and cuts in additional programs and staff just to provide core educational services to our children.

The following chart illustrates the per student cost in thousands along with the average % change in average assessed property taxes within a seven year period. Medway is maintaining a lower than average tax increase BUT note the correlation in lower than average spending per student. Based on the current conditions, this spending per student number will continue to decrease over time.



Medway's limited commerce and industry exacerbates our funding difficulties. With the sale of the Sithe Electric Plant and plans to scrap any expansion, the alternative of commercial funding is diminishing. The reality is that there is very little attractive commercial space within the town.

With capital projects like the new Medway High School, much needed improvements to existing facilities, and the growing number of students entering our schools, many residents are concerned about how they will manage the additional tax burden. Our elderly and long-time residents simply cannot afford tax level increases. New young families and our future generations have the added burden of soaring housing costs.

What can we do?

The challenge becomes ---how can we find funding for necessary school programs and projects with diminishing federal and state dollars available?

We need to find a focused “pinpoint” approach to funding and fostering creative and innovative programs that benefit the entire student population. Fundraising with MFE is one solution.

In addition to funding new programs, MFE will create capital, which will generate investment income to buffer the demands made on the school budget in the years ahead. The principal will create a legacy foundation to support the schools on a consistent basis regardless of successful or

"The current economic slump has forced states to cut more than \$11 billion from their education budgets in the past year. In response to budget cuts, schools across the nation are increasing class sizes, delaying purchases of classroom technology, and scaling back after-school programs. According to NGA and NASBO, the aggregate shortfalls have reached a staggering \$40 billion -- the highest figure ever as a percentage of total state revenues -- and could rise to \$50 billion, or ten percent of total state revenues, if unemployment goes much higher." -NEA

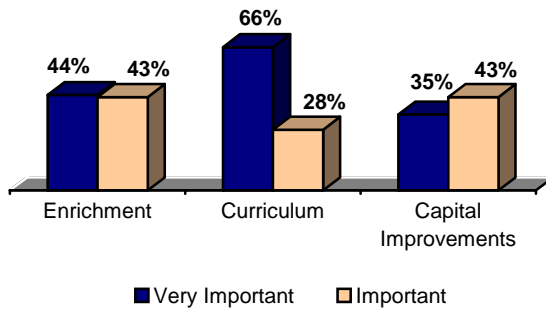
unsuccessful fundraising years. In addition, the endowment will independently support the schools, with minimal required resources or effort, in the event of years where the volunteers dwindle.

MFE can demonstrate solid community support for the schools. When we provide a good working environment for our teachers and staff in the form of funding for profession training and innovative programs, we create a path to attracting and retaining the best teachers in our community.

Where do we start?

We believe the community is an untapped resource. A poll taken on the MedwayEducation.org website in the Fall of 2001 indicated that many families were willing to work toward the goal of finding additional funding.

In addition, these parents had strong opinions about how they would like to see their funding impact the education in Medway. 66% overwhelmingly indicated funding for curriculum was very important *{The survey was taken on the www.medwayeducation.org website. Please visit the site for more details.}*

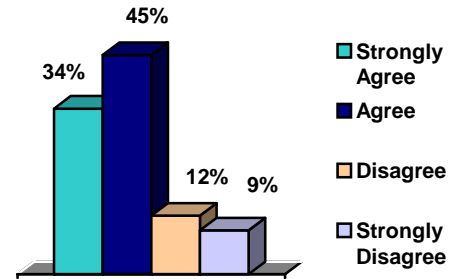


How would you like to see your donations used - Enrichment programs?

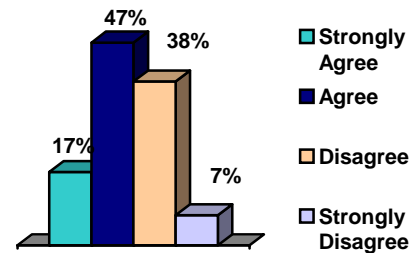
It is clear that our community wants to work towards solving these problems. We need to create an organization to harness this enthusiasm. Corporate programs and grant writing is an area that could be exploited by setting guidelines, policies and procedures for committees or individuals to participate. We can create the material, instructions and templates to put in place a machine that will take advantage of every opportunity available.

Additionally, after a survey of surrounding towns, we discovered that many of them have implemented Education Foundation, which have been in place, approximately 10 years or more. We would model our fundraising efforts based on a combination of each town's most successful programs. For example, Lexington raises approximately \$45k for their Trivia Bee, Approximately 60k for their diner event, and they have just started their endowment fund.

Town	Inception	2001 Awards	Fundraisers	Endowment
Dover/Sherborn	1984	200,000	Fall Celebration Dinner Dance, Phone-a-thon	Yes
Weston	1995	190,000	Monte Carlo Night, Gift Wrap, Annual Drive	No
Lexington	1989	128,000	Trivia Bee (\$370/Team), Educated Tastes, Annual Drive	Yes
Needham	1990	44,376	Spelling Bee (\$350/Team), Direct Donations	No
Wellesly	1984	27,000	Annual Drive	Yes
Framingham	1990	13,844	Spelling Bee, Direct Donations	No



Use online programs where merchants allocate up to 20% of your purchase to a non-profit of choice?



If your company has a philanthropy program would you work with us to take advantage of this funding?

Our Mission

Medway Foundation for Education (MFE) is a non-profit, non-political organization established to preserve and improve Medway's quality education while reducing the impact of limited school budget funding. The MFE will seek to provide community members with a positive, proactive means of contributing to the well being our children the while contributing to Medway's financial vitality.

Goals

The Medway Foundation for Education expects to accomplish its mission by achieving several goals:

1. Establish fundraising events and in turn, distribute the proceeds to the schools in the form of grants for innovative programs to enhance and enrich Medway's core curriculum. In addition to curriculum supplements, the funds would also be used to support profession-training programs for teachers and administrators.
2. To raise an original \$1,000,000 that will create an endowment on the basis of principal and investment income. The principal will create a legacy foundation to support the schools on a consistent basis regardless of successful or unsuccessful fundraising years. In addition, the endowment will independently support the schools, with minimal required resources or effort, in the event of years where the volunteers dwindle.
3. Combine Parent/Community involvement, grant writing, project definition and strategies to seek out creative and innovative programs to bring our educational curriculum to a higher standard.
4. Promote awareness of the cost of education and the positive impact on our community when we support our schools.

The Benefits

1. Improve the level of education for Medway Students which will allow our children to maximize their opportunities for continued education or employment.
2. Maintain Medway's reputation of educational excellence, which will then sustain a vibrant community.
3. Implement a proactive approach to managing future needs of our schools.
4. Attract and retain the best-qualified teachers to our schools.

The Risks

1. Rapidly declining MCAS Scores.
2. Deficient education for our children.
3. Declining property values.
4. Declining Community.

Our Approach

The mission and goals of the Medway Foundation for Education are accomplished by the following strategies:

1. Collect funds by direct contribution of businesses and local citizens in the Medway Community. See Gift Giving, below.
2. Plan and execute Special Events for fundraising (Trivia Bee, Educated Tastes Food Tasting event, etc.)
3. Plan and execute grant-writing efforts to raise contributions from foundations and other non-profit organizations.
4. Collaborate with other Medway charitable organizations to prevent fund raising conflicts and to promote alliances among all non-profit groups that serve Medway.
5. Develop and execute a comprehensive marketing, public relations, and educational program that creates community awareness about Medway School District needs and projects and their impact on Medway's quality of education.

6. Implement an effective distribution mechanism to fund innovative programs district wide. This mechanism will include a website containing full explanation of the procedure and guidelines for participating in the MFE grant program including online grant applications.

Special Events

1. **Annual Drive** – A campaign, which will solicit, direct donation from the public and private donors.
2. **Trivia Bee** – Teams of 10-15 will pay a \$350 entry fee to participate in an evening program. The program will be administered similar to a spelling bee but based on a Trivial Pursuit concept.
3. **Educated Tastes** – A community food tasting event, which will be catered by local restaurants & Chefs. Ticket prices will be based on pricing fees for cost of food.

Gift Giving

1. **Corporate Matching Gifts Programs:** Optimize the use of Corporate Matching gift donations by providing instructions to donors on how to maximize their donations using their company's philanthropy programs.
2. **Gifts of Cash** – A gift of cash would be the easiest approach. We would have the donor send any "Matching Gift" form their employer. Additionally, an appeal would be sent out with the household property taxes with a request for a donation.
3. **Gifts of Stock** - Giving long-term appreciated stock offers a two-fold tax savings. The donor would avoid paying capital gains tax on the increase in value of the stock and also receive a tax deduction for the full fair market value of the stock.
4. **Gifts of Real Estate** - A charitable gift of real estate could have many tax advantages to our donors. The property may have appreciated in value over the years and the sale would result in sizeable capital gains tax. If given outright as a charitable donation, they could avoid the tax and, at the same time, realize a charitable deduction for the full market value of the real estate.
5. **Gifts of Life Insurance** - If a donor owns a life insurance policy that is no longer needed, they could receive a charitable deduction by gifting it to the MFE. If the policy has a cash value, the donor can take a charitable deduction approximately equal to the cash value at the time of the gift. If annual premiums are still to be made and the donor continues to pay them, these premiums will become tax deductible each year.
6. **Life Income Gifts** - A life income gift allows a donor to transfer assets over to the MFE, and continue to receive the income from the cash, stock, or other property contributed. A life income gift is often made through a trust arrangement called a "unitrust" or an "annuity trust " and we would instruct the donor to talk with their accountant or financial advisor for details on how to take advantage of this option.
7. **Bequests** - If the donor is concerned with long-term tax savings, they may want to consider a charitable bequest in your will where you can save significantly on estate tax. The MFE can be named as a beneficiary in a will through a simple amendment, called a codicil.

Grants & Awards

Optimize the use of our committees to take part in corporate philanthropy programs in the form of employee awards and grants. For example State Street Corporation has the William Edgerly award which is given each year to employees who demonstrate a commitment to the community in the form of volunteering. The award is given to the employee's selected non-profit.

This event would be highly publicized to the community and the committee would be responsible for providing support to the donors in the form administration services (proposal writing, printing, etc.).

Retailer Reward Shopping or Rebates

These programs are considered to be on auto pilot and once our organization has been registered with them we would simply introduce the process by which parents and community members cant take advantage of the programs for our schools. Some examples would include:

1. Local Retailers
2. Target Stores
3. Walmart
4. Staples
5. Online and Catalog Retailers

Raffles and Lotteries

A traditional form of selling tickets for cash or material prizes.

Medway Example Programs

The Dover Sherborn Education Fund (DSEF) is self-described as one of the most successful education funds in the state of Massachusetts. The information below provides the programs funded by DSEF in 2000-2001 but also illustrates how Medway Foundation for Education could support our schools.

Pine Hill School \$35,223

<i>Science Tools: \$4,229</i>	This grant, written by the fifth grade teachers, is requesting 12 microscopes with a projection system and five balance scales. These tools would be employed in the fifth grade's Pond Life unit. They would be divided among the classrooms.
<i>The Inclusive Classroom: \$30,994</i>	This grant proposes a wireless lab, a "Mimeo" whiteboard system for each grade, and assistive technology software. The laptops would be used in small groups for Internet research as well as word processing.

Dover Elementary Schools \$32,126.00

<i>Biography Collection \$ 5,000</i>	This grant would begin to rebuild the biography collection. Currently grades 3-5 do reporting requiring biographical information and the current library collection is inadequate. Approximately 250 books would be ordered.
<i>A Closer Look \$3,145</i>	This grant would entail the purchase of ten mid-range quality stereomicroscopes manufactured specifically for elementary age students. Currently there is a single stereomicroscope (purchased by DSEF) being used in the fourth grade. The principal advantage of the stereomicroscope over a standard microscope is that the two optical pieces and a greater distance between the stage and the magnifier allow students to examine much larger objects. Consultation with local scientist and parent Barbara Brennessel pointed us in the direction of these particular scopes, as they will stand up to repeated use for years to come.
<i>Listen Up \$ 2,802</i>	Each Kindergarten class would be equipped with a state of the art listening center. These will be used to reinforce phonics skills and develop listening and beginning reading skills independently.
<i>Audio\Listening Recording Centers \$3,900</i>	Listening centers would be available in 13 areas, equipped with CD/Audio Tape Recorders to reinforce reading skills and comprehension in all subject areas. Students will have access to the same resources in the school regardless of reading ability.
<i>Weathering The Day \$2,150</i>	The AirWatch Weather Station is an external rooftop sensor suite capable of measuring wind speed, wind direction, temperature, relative humidity, light intensity, and precipitation. The data from the sensor suite is processed in a master control, displayed on a large digital display, and can be analyzed and graphed using AWS software. We want to empower the 5 th grade students to move beyond simply learning about meteorology and to become meteorologists.
<i>Step Outside \$6,000</i>	The purpose of this proposal is to engage all students in activities that will promote

	awareness and understanding of nature, while at the same time instilling a sense of respect and pleasure that is offered by our natural environment. We look forward to the implementation of our new program Step Outside that consists of three components. Clare Walker Leslie would be established as “naturalist in residence”. Native trees and shrubs will be planted in a designated section of the new school grounds. A butterfly garden will be installed and maintained.
<i>Sound System for School Programs \$900</i>	Music is used in conjunction with the physical education curriculum as well as numerous physical education programs for parents, faculty, staff, administration and community. This equipment will allow the arranging of music so that programs and classes can run smoothly with minimal interruption to change music. Current equipment is out of date, has poor sound quality, and does not allow for the easy creation of a mixed CD or tape. Classroom teachers would be encouraged to use this equipment when putting together a CD or tape for classroom purposes with a lesson or assembly.
<i>National Parks Curriculum \$2,860</i>	Ken Wadness will develop this social studies curriculum pilot program to educate students about the national parks. This curriculum is strong in geography and will require students to research, write, and report about a national park. The fourth grade at the Pine Hill School will share this curriculum.
<i>Integrated China Studies \$1,720</i>	Sue Beavers and Lois Libenson will be creating a China Studies Program for Dover elementary students. The purpose of this program is to help students challenge their stereotypes and widen their global perspective. Trade books, handicrafts, calligraphy and other materials will be included in kits to be used in the classroom. These kits will be constructed during a summer workshop at Primary Source in Watertown. The third grade will pilot the program for the 2001-2002 school year. Materials will be available to other grades with a long-range goal to develop a complete 1-5 program.
<i>Engineering Connections \$ 3,649</i>	The K’NEX Classroom Super Set will build basic concepts in math, science, technology, engineering and language arts. This is a hands on activity to stimulate creativity and problem solving. The second grade teachers believe our current curriculum does not meet the new science frameworks in this area.

Dover Sherborn Middle School \$59,000

<i>Middle School Library Computers \$9,000</i>	These funds will purchase 8 student workstations and 1 administrative workstation. The Library is the core on the school. Both the administration and the Technology advisor recommend this grant as the highest priority. POSITIVE will continue to support this grant also when funds become available.
<i>Wireless Portable Computer Lab \$40,000</i>	The English Department is requesting an additional wireless/portable writing lab of 23 computers to enable students to have more time to use the equipment. The success of last year’s pilot program surpassed all expectations and the desire of all teachers and students to use this equipment more often has led to this year’s request. The English Department is eager to assist other departments in the use of this equipment. All students in the school will be affected by this grant. This grant was determined to be a priority in funding by the Middle School Access committee since it would greatly expand an existing program that is gaining a tremendous benefit from the technology. In addition, the technology would be shared with other departments that could benefit from such wireless labs in the future. Exploring Computer Art \$4,000
<i>Tools for Integrating Technology \$6,000</i>	The primary goal of this proposal is to provide students with knowledge and hands on experience of how technology can be used to create and enhance artwork. This proposal seeks to fully equip the 2 existing PC labs to create an art room website.

Dover Sherborn High School \$68,650

<i>Wireless Portable Writing Lab \$40,000</i>	A Request for a portable writing lab to serve up to 20 students. Lab will foster the development of writing skills as described by the English Department and enable the lab to be used for research in the Science department. The portable lab can be easily moved to another building and requires minimum electrical resources.
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<i>Social Studies Enrichment</i> \$2,000	Outside speakers and programs will bring a real life dimension to our curriculum. The goal will be to maximize the greatest amount of student participation as educationally possible.
<i>English Enrichment</i> \$2,000	The English Department uses this grant to fund speakers, actors' workshops, poetry readings, dramatic presentations, etc. for specific classes and /or the entire school. This grant benefits all students and enriches the classroom experience.
<i>AAU&CAPAY Enrichment Funds</i> \$1,500	Diversity enrichment for the entire student body. Funding for activities for the Alliance for Acceptance and Understanding and the Coalition for the Asian Pacific American Youth. Programs will include issues of diversity, intolerance, Asian-American issues and culture.
<i>Teaching Modern Science</i> \$15,000	This grant would provide a set-up consisting of 6 computers and 6 PASCO interfaces with probes that would enhance the level of every science discipline. The computers and PASCO interfaces would be housed in a central area that is accessible to all the science teachers. Every student would make use of this technology during his or her studies at the High School.
<i>Advanced Technology Lab Completion</i> \$7,200	This request is to purchase the remaining Dell workstations (remaining from the Advanced Technology Lab Grant funded in 2000). The English, Math, Music, Art Departments, Year Book staff and the growing Virtual High School Program use the lab.
<i>Digital Camera for Astrophotography and General Use</i> \$950	This grant requests the purchase of a new digital camera that would be used for night photography, astronomy classes, physics classes and the development of student web pages.

K-12 Region-wide Grants \$9,980

<i>Supplemental Transportation METCO</i> \$6480	The METCO program has spent the entire amount funded by DSEF last year for supplemental transportation as of March 8, 2000. The additional amount being requested this year reflects the projected amount to cover the whole school year in 2001-2002. The METCO administrators are looking into hiring vans to carry more kids and purchasing MBTA passes for next year.
<i>Teacher Leader-Mentor Training</i> \$3,000	Grant applies to K-12 teachers, as consultant would work with representatives from all grades. Plans to continue implementation of established mentor program using consultant Kathy Dunne to assist in curricular and instructional alignment within standards-based reforms, cognitive coaching, and collaborative mentoring. Administration supports request.
<i>Sheet Music for a String Ensemble Music Program</i> \$500	Seed money to fund the purchase of sheet music to start up a string program for interested students.

Grand Total for K-12 system \$204,979

Basic Policies

1. MFE will consider funding any Medway School District project or program.
2. MFE functions as an independent entity separate from the school district.
3. MFE is a permanent endowment with a commitment to making contributions from the interest created from the investment of principal.
4. MFE is not formed for financial gain and no part of the Endowment can be distributed to the benefit of its directors or officers.
5. MFE shall not participate in or intervene in any political campaign or act on behalf of any candidate in office.

References

Massachusetts Department of Education
US Department of Education
National Education Association
Non Profit Law
Internal Revenue Service
Weston - <http://www.weston.org/Schools/WEEFC/>
Dover/Sherborn - <http://www.dseducationfund.org/>
Natick - <http://www.natickedfoundation.org/>
Newton - <http://www.newton.mec.edu/NSF/>
Lexington - <http://www.lexedfoundation.org>