Talking Points

Introduction
- share a brief description of his/her institution (i.e. small, medium, large, urban, surburban, rural, comprehensive, research, etc.)

- UC Berkeley is a large public research university
- Serves students in state, across nation, and internationally
- One of 10 UC campuses in the state, governed by UC Office of the President that oversees all 10 campuses, and intersects with CA State University system as well as CA community college system
- Thus complex development environment, with a many competing stakeholders; as a public university in California, Berkeley has struggled with funding as the state has struggled with its budget over the past 6 years. As a leading research university, primary focus not education; education has primarily been the focus of CA State system.

- identify his/her institution’s cohort (how long have you been at this?) and goals for UTeach enrollment and minimum endowment target

- Cohort 1; replication period 2008 through 2012, so now almost 2 years post-replication; enrollment and teacher credentials awarded continues to increase
- For example, for 2013-14:
  o Total course enrollment 370 (including 250 unique students)
  o 30 students completed the Cal Teach minor (prior to App Teaching)
  o 12 students completed Apprentice Teaching, will receive credential (17 admitted for fall 2014)
  o We believe we are on target to reach steady-state at 50 students completing credential per year in 3 to 5 years
- We have raised 3 million in endowment so far (including the 1 million NMSI match after replication), and ideally would like to raise an additional 2 million in endowment

- state how much has been raised for Endowment and Operating in support of UTeach
  o Currently operating on an approximately 1 million-dollar budget. We have raised 3 million in endowment so far, current principal is 3.5 million. 1 million is a 10-year declining balance endowment. Approximately 15% of our current budget depends on endowment funds (and 45% campus, 15% state, 25% federal and private foundation grants, no individual philanthropy).
Questions

1. How is your development office resourced to fundraise for Cal Teach (i.e. marketing/branding budget, designated staff, etc.)?

   • There is a large development office at UC Berkeley, and we have in the past paid the salary for a half-time development officer devoted to Cal Teach.
   • We have struggled a bit figuring out how to best work with this development office, as they have many programs and departments for which they are trying to raise money, and education is not as much a priority as STEM research. And there is a need to keep tabs on who is pursuing certain donors, so that they do not get approached by multiple people at the same time.
   • Recently we have started the hiring process for a half-time development officer that will work in our office as a Cal Teach staff person, and who will interact with the main campus development office.

2. What infrastructure has been put in place to support fundraising for and tracking of UTeach gifts (i.e. proposal and MOU templates, web presence, etc.)?

   • Infrastructure is likely to be very different depending on the context of each UTeach campus. For example, at Berkeley several different campus units are involved, in a complex picture that Cal Teach leadership has slowly come to understand. To mention a few: campus development office that I just mentioned, Sponsored Project Office responsible for any grant funding, who interact with Business Contracts Office and Risk Management for MOUs, an Extramural Funds Accounting office who provide financial and accounting services, and a variety of legal assistance offices.

3. What branding strategy has your institution employed?

   • Cal Teach Berkeley students are highly motivated STEM majors, who receive an excellent education in their STEM disciplines from world-class faculty. Thus they are extremely well-qualified in the content area, and have multiple opportunities to engage in cutting-edge research. They are also passionate about social justice, and want to give back to their communities through math and science education.
   • We hired an outside communications firm to develop marketing materials and a series of creative awareness campaigns, and a website developer to simultaneously create an engaging and user-friendly web site.

4. In what area have you been most successful? Why?

   • Writing grants for federal, state and private foundations because the Cal Teach faculty co-directors and I are more familiar with this approach.
We have been able to make a case for a generous instructional funding budget from our campus (paid for by tuition), which is renewed on a yearly basis.

Working with one particular development officer who was passionate about our mission, and educated us about what we needed to do. He is no longer with us.

Getting an excellent scaling and sustainability strategic plan from consultants we trust, that has helped us with strategizing other approaches (see below).

Forming partnerships—would like to focus more on districts in future.

5. What challenges are you encountering and what strategy have you identified to move forward?

- Grants are for several years at most, and new initiatives are needed for renewal. New initiatives have sometimes taken a path that require more staff coordination than we have capacity for, and are currently being cautious about taking on something new that is not directly related to our goals—this is an important ‘lessons learned’ that we want to share with newer programs
- We have not had a long-term dedicated development officer to devote the time required to build relationships with private donors, but are in the process of hiring. Neither I nor our Co-Directors have had the time to devote the attention that is needed.
- Several private donors backed out after we had a number of meetings, and a big investment of our time, and thought we were close to getting a commitment.
- A number of private donors and foundations that sponsored us originally have more recently changed their focus away from secondary STEM education. Eg. To early childhood education or to more ‘systemic’ efforts
- We are being attentive to forming new partnerships with organizations that have very similar goals. Eg. 100Kin10—we have not been successful yet in a proposal, but have formed excellent relationships with others in the organization (New Teacher Center)
- See more on strategy below.

6. How are you using UTeach institutional leadership, faculty and students to engage prospects and donors?

- A very supportive chancellor and dean, that have been attentive to connecting us with donors who could potentially be interested in us.
- As these leaders step down this year, we are having them introduce us to new chancellor and dean
- In early days, held a retreat with STEM faculty leaders. Intend to establish a faculty advisory board in next year.
- Some Cal Teach faculty, and especially student leaders, have made presentations to funders and accompany us to fund raising events

7. Are you employing any unique tactics or strategies to fundraise for UTeach?
• Couple fundraising with the other education organization under the Berkeley and Science Math Initiative umbrella, Math for America Berkeley, in-service teacher professional development and leadership program.
• Worked with UC Berkeley Haas business school graduate students to develop a Scaling & Sustainability plan/4 recommendations:
  o Endowment- focus on declining endowment, requires 50% principal and may have more appeal to donors. We are interested to hear whether others have had success in this area.
  o Targeted grant applications to highest potential matches
  o University funding—already successful with instructional budget, eg. Master teachers. State funding currently covers staff salaries, but we are stretched thin and would ideally like more campus support. We function much like a small department, but do not get institutional support for staff in the same way.
  o Cultivate relationships with legislators for CA state funds earmarked for STEM teacher training programs—have not yet tried this approach

8. Please share a success story.
• Discuss relationship with a local private foundation, and how it has evolved over time. This foundation has been instrumental in offering key advice. Will elaborate during panel.

9. If you could re-wind the clock, what would you do differently to better position your program for success?
• Hire a reputable organization to develop a strategic plan sooner
• Stay focused on immediate goals, and not be tempted to add to program in order to be eligible for funding to keep staff capacity more manageable
• Hire or work with a dedicated development officer sooner. A few years ago, the development model in the college changed but we did not fully understand what the implications were for us at the time.