LAFAYETTE PARTNERS IN EDUCATION
from the first day to graduation day

General Board Meeting
May 5, 2020 - 9:00am
Meeting Via Zoom

I. Call to Order

II. Welcome Beth Goldberg, New Executive Director

III. Approval of March 3, 2020 General Board Meeting Minutes

IV. Presentation from Concentric Wealth Management - Stewart McGuire

V. President's Report – Jaia Kaufman

VI. Vice President's Report - Jennifer Martell

   a. Budget Process Update

VII. Fundraising Reports

   a. Annual Giving Campaign - Bianka Ahuja & Amy Parlett

   b. Major Donor Campaign – Scott & Kirsten Jeffery

   c. Community Campaign

      1. Business Partner Program - Jennifer Palmer

      2. Events - Danielle Gallagher

   d. Participation Report

VIII. Volunteers – Danielle Lederman

   a. Presentation & Vote: 2020-2021 LPIE Board Slate

IX. Treasurer's Report - Yariv Robinson

X. Executive Director's Report - Myrna Kimmelman

XI. Lafayette School District Report - Richard Whitmore & Mary Maddux

XII. Acalanes High School Report - John Nickerson & Travis Bell

XIII. School Chair Reports - Jennifer Martell & School Chairs - no report

XIV. Communications Report – Maria Nicolacakis & Marisa Wilson - no report

XV. Arts & Humanities Report – Jennifer Flowers - no report

XVI. Music & Performing Arts Report – Kelly Daggs - no report

XVII. STEM Report - Tiffany Coultas - no report

XVIII. New Business

XIX. Adjournment

Upcoming Events and Meetings

- LPIE Board Meeting - June 2, 9:00am, Meeting Via Zoom

LPIE General Board Meeting
March 3, 2020 9AM
Acalanes High School District Board Room

Voting Members: Jaia Kaufman, Jennifer Martell, Yariv Robinson, Lisa Spiegler, Linda Choi, Amy Parlett, Jennifer Palmer, Maria Nicolacakis, Marisa Wilson, Danielle Lederman, Kelly Daggs, Andrea Hilsabeck, Denise Cain, Ali Krick, Erica Mason, Neda Wilson, Laura Ceridono, Salab Amirdelfan, Michele Colaco, Jocelyn Birrell, Beth Goldberg, Danielle Gallagher, Jennifer Flowers, Tiffany Coultas, Bob Hockett, Richard Whitmore, Dave Smith, Tom Mulvaney

Other Attendees: Myrna Kimmelman, John Nickerson, Travis Bell, Mary Maddux

I. Call to Order 9AM

II. Approval of February 4, 2020 General Board Meeting Minutes. Motion: Bob Hockett. Second: Kelly Daggs. Motion carries.

III. Audit Committee Report (Tom Mulvaney)

a. Motion to accept audit committee's recommendations: Richard Whitmore. Second: Lisa Spiegler. Motion carries.

b. Motion to appoint Regalia and Associates as our outside auditors for FY 2019-2020: Amy Parlett. Second: Lisa Spiegler. Motion carries.

IV. President's Report (Jaia Kaufman): Bylaws committee proposed revisions.

a. Remove the recruitment and volunteer chair and move responsibilities.

b. Amend the number of community at large reps from 3 to up to 5.

c. Clarified that school chairs must be current school parents at respective school sites.

d. Clarified PO appointments. Best person on the PO board is the vice president.

e. Added definitions to the bylaws for officers of the organization, personnel committee, budget commitment committee, finance committee.

f. Motion to accept recommended bylaw revisions as outlined in the summary of recommended revisions: Kelly Daggs. Second: Richard Whitmore. Motion carries.

V. Vice President's Report – No report

VI. Fundraising Reports

a. Annual Giving Campaign (Amy Parlett) –At 83% of total LPIE goal. Participation challenge yielded some positive results. Suggestion was made to invite non-donors for a special walk through/meet and greet with the principal and tour around to see what LPIE money is doing. AGC also plans on sending an email targeting 8th grade families going to Acalanes since they just selected their courses.

b. Major Donor Campaign (Jaia for Scott and Kirsten Jeffery): continues to do really well.

c. Community Campaign

i. Business Partner Program (Jennifer Palmer): things are going well. Working to make sure the business partners get all their benefits, advertisements, tickets and everything they get. Still collecting money from Giving Tuesday. Some businesses appreciate knowing that you are going to them because of their support of LPIE.

ii. Events (Jaia for Danielle Gallagher): Power Party – March 21 VIP reception at 5; main party starts at 6. Really need wine bottles. Need about 50 more wine bottles. Drop off at the office. If you are a school chair and you have information on pay to plays, let us know right away. Please come to the auction preview in the LPIE office from 3-6PM on March 10 and 9AM-4PM on March 11.

VII. Volunteers (Danielle Lederman): Preliminary 2020-2021 LPIE Board Slate printed on page 15 of packet; has a good mix of returning folks and new folks.

a. President: Jennifer Martell

b. Vice President: Danielle Gallagher

c. Treasurer: Paul Chopra

d. Past President: Jaia Kaufman

e. Secretary: Linda Choi

f. Fundraising_AGC: Amy Parlett

g. Fundraising_Major Donors: Scott and Kirsten Jeffrey

h. Fundraising_Business Partners and Community: Dave Smith

i. Events Chair: Tiffany Coultas

j. Communications Chair_Publications: Maria Nicolacakis

k. Communications_Digital and Social Media: Michele Colaco

l. Acalanes Co-Chairs: Jennifer Palmer, Laura-Kate Rurka

m. Stanley Co-Chairs: Tina Frechman, Andrea Hilsabeck

n. Burton Valley Co-Chairs: Michele McNeil, Erica Mason

o. Happy Valley Co-Chairs: Jessica Lim, Saleb Amirdelfan

p. Lafayette Co-Chairs: Jocelyn Birrell, Tricia Emerson

q. Art&Humanities Co Chairs: Jennifer Flowers, Ali Krick

r. Music and Performing Arts Chair: Kelly Daggs

s. STEM Chair: Bianka Ahuja

t. Acalanes UHSD Representative: Bob Hockett

u. LAFSD Representative: Richard Whitmore

v. Community at Large Representative:s: Tom Mulvaney, Jennifer Perlmutter, Lisa Spiegler

VIII. Treasurer's Report (Yariv Robinson). Refer to page 17 of the packet for the operating budget. Tracking well on revenues. Nothing unusual regarding disbursements.

IX. Executive Director's Report – No report

X. Lafayette School District Report (Richard Whitmore and Mary Maddux)

a. Math articulation meeting among teachers to discuss where are we in the work around the standards and to discuss the transition from middle school to high school. AUHSD presented on their work around essential standards and how it plays out based on their courses and what are essential standards.

b. Staff development on literacy to learn about strategy groups. Staff developer at each elementary school. Modeled how you pull a small strategy group and teachers practiced that. Good feedback from the teachers.

XI. Acalanes High School Report (John Nickerson and Travis Bell)

a. School Board meeting tomorrow where they will review the second interim budget. $1.8m deficit this year. Pulling out of reserve at 2% a year. Not a long-

term solution. Also, just entering into conversations with teacher bargaining units.

b. Math articulation – heard that it went really well. Did a lot when we first transitioned to the common core. Since then, 4-5 years later, teacher have been collaborating and articulating. Now formalize it and ramp up practices and think about pathways and accessibility.

c. Coronavirus – good conversation at the county health department to educate on preventative measures and standard flu prevention. Ramping up cleaning and changing the emphasis to make sure surfaces are cleaned more frequently and sick kids and staff stay home. Work with staff to be as flexible as possible when kids are out of school. Situation is changing rapidly so just keeping an eye on things. School closure is a complicated decision. We're not there yet. Exploring online vehicles to move things forward but concerned about inequities and disparities in terms of access.

d. Urinetown – opening this week. Thursday, Friday, Saturday.

e. Girls soccer – NCS championship. Playing for CIF Norcal title.

f. March 13 – staff development day – quality collaboration time and building common assessments and building interventions for students not meeting standards. Also SEL standards and how to build into their lessons.

g. March 25 – WASC school accreditation school site visit.

h. March 26 – annual talent show

XII. School Chair Reports – No reports

XIII. Communications – No report

XIV. Arts and Humanities Report – Jennifer Flowers

a. Stroke of Luck/Art Ambassadors reception on March 17 from 4-6PM

b. Orinda Library Art Gallery: Art will be on display March 12-26

XV. Music and Performing Arts Report -- No report

XVI. STEM Report – Tiffany Coultas – no report

XVII. New Business – none

XVIII. Adjournment 10AM

Upcoming events

- March 3 – Measure L –get out to vote
- March 13 – Lafayette Citizen of the Year dinner at the Lafayette Park Hotel
- April 7 – next board meeting scheduled for 7pm

LPIE Investment Guidelines

Total Portfolio (April 30, 2020) = $2,011,165

	Liquidity Portfolio (<3 years)	Balanced Portfolio (3-10 Years)	Endowment Portfolio (10+ Years)
	Schwab **$256,532**	Schwab **$1,250,513**	Schwab **$504,120**
Allocation:	0% Stocks, 100% Bonds	65% Stocks, 35% Bonds	85% Stocks, 15% Bonds
Purpose:	Short-Term Cash Needs Replenish Operating Accts Manage Portfolio Flows Place to Sell Stock Gifts	Mid- to Long-Term Horizon Replenish Liquidity Portfolio	Long-Term Horizon Replenish Liquidity Portfolio Annual Distribution (3-5%)

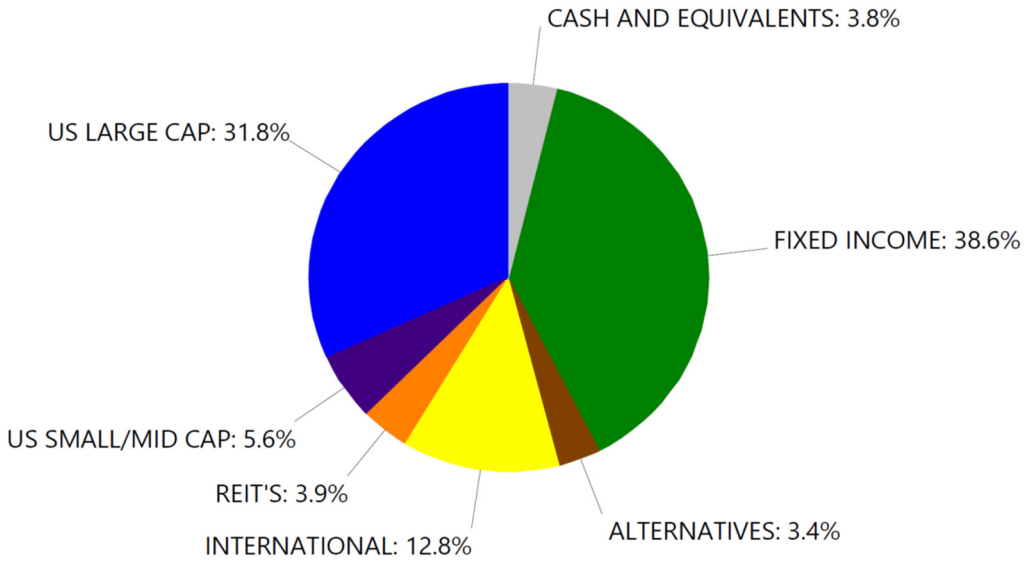
CONCENTRIC
WEALTH MANAGEMENT LLC

Combined Portfolio Allocation

58% Stocks, 42% Bonds & Cash

(Combined Liquidity, Balanced and Endowment)

As of 4/30/2020



Description	Weight	Current Value
US LARGE CAP	31.8%	639,905.65
US SMALL/MID CAP	5.6%	112,786.53
REIT'S	3.9%	78,676.00
INTERNATIONAL	12.8%	256,653.38
ALTERNATIVES	3.4%	68,851.42
FIXED INCOME	38.6%	777,193.30
CASH AND EQUIVALENTS	3.8%	77,098.26
	100.0%	2,011,164.54

CONCENTRIC
WEALTH MANAGEMENT LLC

LPIE Performance History

	2013 *	2014	2015	2016	2017	2018	2019	YTD 4/30/2020
Beginning of Year Value *	1,195,284	1,251,476	1,612,007	1,562,389	1,662,386	1,848,665	1,732,910	2,245,567
Net Contributions	104	285,019	(18,909)	(14,989)	(6,445)	(8,480)	207,338	(16,374)
Capital Appreciation	49,022	55,370	(54,204)	89,703	163,713	(140,630)	267,834	(226,814)
Income	10,266	28,881	33,968	36,022	40,368	45,536	50,458	15,646
Management Fee	(3,742)	(9,023)	(10,436)	(10,578)	(11,491)	(12,313)	(12,890)	(6,797)
Accrued Interest & Other Expenses	542	284	(37)	(160)	98	131	(82)	(65)
End of Year Value	1,251,476	1,612,007	1,562,389	1,662,386	1,848,665	1,732,910	2,245,567	2,011,165
Time-Weighted Return (Net of Fees)	**5.84%**	**5.45%**	**(1.92%)**	**7.38%**	**11.59%**	**(5.81%)**	**16.83%**	**(9.78%)**

* All 2013 data is since inception date of 5/31/2013.

CONCENTRIC
WEALTH MANAGEMENT LLC

LPIE DONATION ANALYSIS COMPARISON - CURRENT (4/27/20) VS. PREVIOUS YEAR

School	School Student Count	# of students in Donor Families	% of Students in Donor Families	Total Donation $	Donation per Student in Donor Families	School Student Count	# of students in Donor Families	% of Students in Donor Families	Total Donation $	Donation per Student in Donor Families
	2019-20 as of 042720 (2 months prior to comparative month)					**2018-19 as of 063019**				
Acalanes	1290	700	54.3%			1315	705	53.6%		
Burton Valley	734	474	64.6%			793	548	69.1%		
Happy Valley	537	382	71.1%			557	413	74.1%		
Lafayette	548	331	60.4%			536	358	66.8%		
Springhill	451	306	67.8%			451	321	71.2%		
Stanley	1251	731	58.4%			1213	784	64.6%		
Totals	**4811**	**2924**	**60.8%**	**$ 3,215,054**	**$ 1,099.54**	**4865**	**3129**	**64.3%**	**$ 3,554,832**	**$1,136.09**
K-5 Totals	2270	1493	65.8%	$ 1,809,942	**$ 1,212.29**	2337	1640	70.2%	$ 2,064,273	**$1,258.70**
Stanley	1251	731	58.4%	$ 812,382	**$ 1,111.33**	1213	784	64.6%	$ 868,097	**$1,107.27**
LafSD	**3521**	**2224**	63.2%	**$ 2,622,324**	**$ 1,179.10**	**3550**	**2424**	68.3%	**$ 2,932,370**	**$1,209.72**
Acalanes	**1290**	**700**	54.3%	**$ 592,731**	**$ 846.76**	**1315**	**705**	53.6%	**$ 622,462**	**$ 882.92**
	2019-20 as of 123119					**2018-19 as of 010819**				
Acalanes	1290	689	53.4%			1315	677	51.5%		
Burton Valley	734	429	58.4%			793	509	64.2%		
Happy Valley	537	366	68.2%			557	393	70.6%		
Lafayette	548	308	56.2%			536	341	63.6%		
Springhill	451	273	60.5%			451	288	63.9%		
Stanley	1251	695	55.6%			1213	754	62.2%		
Totals	**4811**	**2760**	**57.4%**	**$ 2,715,044**	**$ 983.71**	**4865**	**2962**	**60.9%**	**$ 2,791,599**	**$ 942.47**
K-5 Totals	2270	1376	60.6%	$ 1,485,321	**$ 1,079.45**	2337	1531	65.5%	$ 1,135,611	**$ 741.74**
Stanley	1251	695	55.6%	$ 696,128	**$ 1,001.62**	1213	754	62.2%	$ 516,033	**$ 684.39**
LafSD	**3521**	**2071**	**58.8%**	**$ 2,181,449**	**$ 1,053.33**	**3550**	**2285**	**64.4%**	**$ 1,651,643**	**$ 722.82**
Acalanes	**1290**	**689**	**53.4%**	**$ 533,595**	**$ 774.45**	**1315**	**677**	**51.5%**	**$ 419,312**	**$ 619.37**
	2019-20 as of 100119					**2018-19 as of 092418**				
Acalanes	1290	639	49.5%			1315	642	49.0%		
Burton Valley	734	336	45.8%			793	406	51.0%		
Happy Valley	537	315	58.7%			557	340	61.0%		
Lafayette	548	234	42.7%			536	256	48.0%		
Springhill	451	197	43.7%			451	225	50.0%		
Stanley	1251	595	47.6%			1213	655	54.0%		
Totals	**4811**	**2316**	**48.1%**	**$ 2,002,304**	**$ 864.55**	**4865**	**2524**	**52.0%**	**$ 2,070,955**	**$ 820.51**
K-5 Totals	2270	1082	47.7%	$ 1,048,681	**$ 969.21**	2337	1227	52.5%	$ 1,135,611	**$ 925.52**
Stanley	1251	595	47.6%	$ 519,230	**$ 872.66**	1213	655	54.0%	$ 516,033	**$ 787.84**
LafSD	**3521**	**1677**	**47.6%**	**$ 1,567,911**	**$ 934.95**	**3550**	**1882**	**53.0%**	**$ 1,651,643**	**$ 877.60**
Acalanes	**1290**	**639**	**49.5%**	**$ 434,393**	**$ 679.80**	**1315**	**642**	**48.8%**	**$ 419,312**	**$ 653.13**
	2018-19 as of 063019					**2017-18 as of 063018**				
Acalanes	1315	705	53.6%			1358	712	52.4%		
Burton Valley	793	548	69.1%			805	527	65.5%		
Happy Valley	557	413	74.1%			548	406	74.1%		
Lafayette	536	358	66.8%			537	333	62.0%		
Springhill	451	321	71.2%			472	305	64.6%		
Stanley	1213	784	64.6%			1233	803	65.1%		

Totals	**4865**	**3129**	**64.3%**	**$ 3,554,832**	**$ 1,136.09**	**4953**	**3086**	**62.3%**	**$ 3,201,985**	**$ 1,037.58**
K-5 Totals	2337	1640	70.2%	$ 2,064,273	**$ 1,258.70**	2362	1571	66.5%	$ 1,828,965	**$ 1,164.20**
Stanley	1213	784	64.6%	$ 868,097	**$ 1,107.27**	1233	803	65.1%	$ 767,543	**$ 955.84**
LafSD	**3550**	**2424**	68.3%	**$ 2,932,370**	**$ 1,209.72**	**3595**	**2374**	66.0%	**$ 2,596,508**	**$ 1,093.73**
Acalanes	**1315**	**705**	53.6%	**$ 622,462**	**$ 882.92**	**1358**	**712**	52.4%	**$ 605,477**	**$ 850.39**
	2018-19 as of 010819					**2017-18 as of 123117**				
Acalanes	1315	677	51.5%			1358	697	51.3%		
Burton Valley	793	509	64.2%			805	499	62.0%		
Happy Valley	557	393	70.6%			548	382	69.7%		
Lafayette	536	341	63.6%			537	317	59.0%		
Springhill	451	288	63.9%			472	297	62.9%		
Stanley	1213	754	62.2%			1233	773	62.7%		
Totals	**4865**	**2962**	**60.9%**	**$ 2,791,599**	**$ 942.47**	**4953**	**2965**	**59.9%**	**$ 2,265,104**	**$ 763.95**
K-5 Totals	2337	1531	65.5%	$ 1,590,844	**$ 1,039.09**	2362	1495	63.3%	$ 1,246,747	**$ 833.94**
Stanley	1213	754	62.2%	$ 691,558	**$ 917.19**	1233	773	62.7%	$ 549,209	**$ 710.49**
LafSD	**3550**	**2285**	64.4%	**$ 2,282,402**	**$ 998.86**	**3595**	**2268**	63.1%	**$ 1,795,956**	**$ 791.87**
Acalanes	**1315**	**677**	51.5%	**$ 509,197**	**$ 752.14**	**1358**	**697**	51.3%	**$ 469,149**	**$ 673.10**
	2018-19 as of 103118					**2017-18 as of 102717**				
Acalanes	1315	650	49.4%			1358	657	48.4%		
Burton Valley	793	439	55.4%			805	448	55.7%		
Happy Valley	557	356	63.9%			548	356	65.0%		
Lafayette	536	272	50.7%			537	283	52.7%		
Springhill	451	245	54.3%			472	261	55.3%		
Stanley	1213	688	56.7%			1233	733	59.4%		
Totals	**4865**	**2650**	**54.5%**	**$ 2,437,103**	**$ 919.66**	**4953**	**2738**	**55.3%**	**$ 1,896,395**	**$ 692.62**
K-5 Totals	2337	1312		$ 1,360,870	**$ 1,037.25**	2362	1348	57.1%	**$ 1,022,635**	$ 758.63
Stanley	1213	688	56.7%	$ 610,979	**$ 888.05**	1233	733	59.4%	**$ 474,150**	$ 646.86
LafSD	**3550**	**2000**	**56.3%**	**$ 1,971,849**	**$ 985.92**	**3595**	**2081**	**57.9%**	**$ 1,496,785**	**$ 719.26**
Acalanes	**1315**	**650**	**49.4%**	**$ 465,353**	**$ 715.93**	**1358**	**657**	**48.4%**	**$ 399,610**	**$ 608.23**

LAFAYETTE PARTNERS IN EDUCATION
DONATIONS PLEDGES

	Current Year to Date	Fundraising Goal	Year to Date Previous Month	Prior Year Comparative	Actual
FUNDRAISING REVENUE	5/4/2020	2019-2020	3/30/2020	4/28/2019	2018-19
DonationRevenue					
Annual Giving Campaign (AGC)					
Parents Annual Giving	$ 1,633,693	$ -	$ 1,587,108	$ 2,143,722	$ 2,235,519
Parents Annual Report	$ -	$ -	$ -	$ 5,150	$ -
Parents Follow-up	$ 231,269	$ -	$ 206,756	$ 296,830	$ 308,423
Parents Valentines Challenge	$ 36,033		$ 34,063		
Parent Bus Annual/Parent Bus Partner	$ 53,824	$ -	$ 53,564	$ 30,328	$ 32,011
Giving Tuesday (Parent)	$ 146,105	$ -	$ 145,245	$ 61,546	$ 65,109
Giving Tuesday Parent Match	$ 30,000	$ -	$ 30,000	$ 5,506	$ 5,506
Parent School Donation	$ -	$ -	$ -	$ -	$ 172,140
AGC and PO Total	**$ 2,130,924**	**$ 2,732,000**	**$ 2,056,736**	**$ 2,543,082**	**$ 2,818,708**
Major Donor Campaign					
Parent Major Donor Prospects	$ 969,666	$ -	$ 953,678	$ 618,811	$ 661,791
Community Major Donor Prospects	$ 45,050	$ -	$ 45,050	$ 29,000	$ 35,695
Major Donor Campaign Total	**$ 1,014,716**	**$ 750,000**	**$ 998,728**	**$ 647,811**	**$ 697,486**
Community Campaigns					
Community November Mailing	$ 13,783	$ 15,000	$ 13,783	$ 13,154	$ 13,254
Community Unsolicited or Annual Repo	$ 49,644	$ 25,000	$ 49,043	$ 53,498	$ 59,041
Business Partners	$ 56,369	$ 100,000	$ 45,169	$ 59,395	$ 68,231
Community Senior Exemption	$ -	$ -	$ -	$ 600	$ 600
Giving Tuesday (Comm.)	$ 2,706	$ -	$ 2,706	$ 3,105	$ 3,105
Giving Tuesday Community Match	$ -	$ -	$ -	$ 5,000	$ 5,000
Giving Tuesday (Business)	$ 4,237	$ -	$ 4,237	$ 3,617	$ 3,617
Community Campaigns Sub-Total	$ 126,739	$ 140,000	$ 114,938	$ 138,369	$ 152,848
Events					
2020 Annual Event Income**	$ 282,971	$ -	$ 150,230	$ 457,815	$ 415,435
2020 Annual Event expenses	$ (23,649)	$ -	$ (18,615)	$ (126,992)	$ (127,877)
Unprocessed Annual Event	$ -		$ 137,616		
Sub-Total 2020 Annual Event (Net)	$ 259,322	$ 350,000	$ 269,231	$ 330,823	$ 287,558
2019 Sponsorships (Business) & Ads	$ 5,000	$ -	$ 5,000	$ -	$ 55,900
Refund from 2018	$ (1,340)	$ -	$ (1,340)	$ -	$ -
Annual Event 2019 P2Ps	$ 945	$ -	$ 945	$ -	$ -
Subtotal Previous Year Events	$ 4,605		$ 4,605	$ -	
Special Event Net Income (Poker & Burto	$ 59,818	$ 10,000	$ 59,252	$ 545	$ 620
Community Campaign Total	**$ 450,484**	**$ 500,000**	**$ 448,026**	**$ 469,737**	**$ 441,026**
Matching Gifts					
Parent Matching Gifts*	$ 350,110	$ -	$ 325,428	$ 347,344	$ 383,395
Community Matching Gifts	$ 2,824	$ -	$ 2,740	$ 3,469	$ 4,179
Matching Gifts Total	**$ 352,934**	**$ 375,000**	**$ 328,168**	**$ 350,813**	**$ 387,574**
Unprocessed *	**$ 54,529**	$ -	**$ 102,995**	**$ 12,482**	$ -
Total Donation Revenue	**$ 4,003,587**	**$ 4,357,000**	**$ 3,934,653**	**$ 4,023,925**	**$ 4,344,794**
Scrip/GG Referral	$ 519	$ -	$ 518	$ 379	$ 496
Total Revenue Received	**$ 4,004,106**	**$ 4,357,000**	**$ 3,935,171**	**$ 4,024,304**	**$ 4,345,290**
Endowment (Senior Gift)	*$ -*	*$ -*	*$ -*	*$ -*	*$ 125,579*
PLEDGES					
AGC Pledges					
Parents Annual Giving	$ 120,788	$ -	$ 183,700	$ 109,336	$ -
Parent Bus Annual/Parent Bus Partners	$ 260	$ -	$ 520	$ 1,049	$ -
Parents Follow-up	$ 12,457	$ -	$ 18,202	$ 12,034	$ -
Parent Giving Tuesday	$ 2,451	$ -	$ 3,311	$ 3,562	$ -
Parent Valentine Challenge	$ 3,437		$ 5,406		
AGC & PO Pledge Total	**$ 139,393**	**$ -**	**$ 211,139**	**$ 125,981**	**$ -**

LAFAYETTE PARTNERS IN EDUCATION
DONATIONS PLEDGES

Major Donor Pledges					
Parent Major Donor Prospects	$ 44,001	$ -	$ 69,444	$ 16,599	$ -
Community Major Donor Prospects	$ -	$ -	$ -	$ -	$ -
Major Donor Pledge Total	**$ 44,001**	**$ -**	**$ 69,444**	**$ 16,599**	**$ -**
Community Pledges				$ -	
Community Unsolicited	$ 801	$ -	$ 1,293	$ 764	$ -
Community At Large Campaign	$ -	$ -	$ -	$ -	$ -
Community Pledge Total	**$ 801**	**$ -**	**$ 1,293**	**$ 764**	**$ -**
Matching Gift Pledges					
Parent Matching Gifts	$ 225,854	$ -	$ 239,672	$ 165,939	$ -
Community Matching Gifts	$ -	$ -		$ -	$ -
Matching Gift Pledge Total	**$ 225,854**	**$ -**	**$ 239,672**	**$ 165,939**	**$ -**
Business Pledges					
Business Pledges	$ 17,500	$ -	$ 18,750	$ 11,250	$ -
Business Pledges Total	**$ 17,500**	$ -	**$ 18,750**	**$ 11,250**	$ -
Pledged Revenue	**$ 427,549**	**$ -**	**$ 540,298**	**$ 320,533**	**$ -**
Projected Revenue	**$ 4,431,655**	**$ 4,357,000**	**$ 4,475,469**	**$ 4,344,837**	**$ 4,345,290**

**Includes paid but not processed into database or bookkeeper reports.

01/04/2020

Lafayette Partners in Education
OPERATING ACTUAL TO BUDGET
2019-2020

	2019-20			2018-2019
	Actual-to-Date 04/22/20	**Prior Month Actual YTD**	**Recommended Budget 2019-2020**	**Year-End Actuals 6/30/2019**
Revenues				
Fundraising	$ 3,625,836	$ 3,512,164	$ 3,982,000	$ 4,056,616
Annual Event (Net)	$ 263,927	$ 108,158	$ 350,000	$ 343,458
All Special Events (Net)	$ 59,818	$ 59,770	$ 10,000	$ 620
Endowment Payout	$ 15,000	$ 15,000	$ 15,000	$ 10,000
Operating Gain/Loss/Interest Income	$ 51	$ 51	$ -	$ 755
Total Revenues*	**$ 3,964,632**	**$ 3,695,143**	**$ 4,357,000**	**$ 4,411,449**
Disbursements				
K-5	$ 1,605,520	$ 1,597,369	$ 2,291,759	$ 2,054,179
Stanley	$ 753,746	$ 746,508	$ 1,191,398	$ 1,167,082
Acalanes	$ 527,305	$ 524,686	$ 981,190	$ 892,703
Management			$ -	$ 183,171
Fundraising ***			$ -	$ 181,546
Management/Fundraising	$ 343,888	$ 312,708	$ 462,700	$ 364,717
Total Disbursements	**$ 3,230,459**	**$ 3,181,271**	**$ 4,927,047**	**$ 4,478,681**
Disbursements under/over revenue	$ 734,173	$ 513,872	$ (570,047)	$ 67,232
Spending of Carryover			$ 457,342	$ 240,127
Total under/over	$ 734,173	$ 513,872	**$ (112,705)**	**$ 172,895**
Unrestricted Operating Fund				
LPIE Reserve **	$ 1,889,521	$ 1,991,729	$ 1,527,848	$ 1,527,848
LafSD Carryover	$ 144,006	$ 144,006	$ 144,006	$ 532,416
AUHSD Carryover	$ 273,514	$ 273,514	$ 273,514	$ 439,976
Ending	**$ 2,307,041**	**$ 2,409,249**	**$ 1,945,368**	**$ 2,500,240**
Restricted Funds				
Funds functioning as an Endowment**	$ 463,014	$ 602,783	$ 564,263	$ 564,263

Note: Revenues to date processed by bookkeeper. **LPIE Reserve as reported by Concentric on 03/31/20. ***Fundraising disbursements do not reflect Annual and Special Event expenses which are included as net in revenue. Note: $172,140 of Total Over/Under for 6/30/19 reflects LafSD Parent Org contribution and will be added to LafSD carry-over. Balance of Total Over due to Operating Gains/Loss/Interest

2020-2021 Proposed Slate (5/5/20)	
Position	**Nominee**
President	Jennifer Martell
Vice President	Danielle Gallagher
Treasurer	Paul Chopra
Past President (Parliamentarian)	Jaia Kaufman
Secretary	Linda Choi
Fundraising Chair: AGC	Amy Parlett
Fundraising Chair: AGC	
Fundraising Chair: MDC	Scott and Kirsten Jeffrey
Fundraising: Business Partners &	Dave Smith
Events Chair	Tiffany Coultas
Communications Chair: Publications	Maria Nicolacakis
Communications: Digital & Social Media	Michele Colaco
Acalanes Co Chair	Jennifer Palmer
Acalanes Co Chair	Laura-Kate Rurka
Stanley Co Chair	Tina Frechman
Stanley Co Chair	Andrea Hilsabeck
Burton Valley Co Chair	Michele McNeil
Burton Valley Co Chair	Erica Mason
Happy Valley Co Chair	Jessica Lim
Happy Valley Co Chair	Salab Amirdelfan
Lafayette Co Chair	Jocelyn Birrell
Lafayette Co Chair	Tricia Emerson
Springhill Co Chair	Peter Drevno
Springhill Co Chair	Susan Wiggen
Art & Humanities Co Chair	Jennifer Flowers/Ali Krick
Music & Performing Arts Chair	Kelly Daggs
STEM Chair	Bianka Ahuja
Acalanes UHSD Representative	Bob Hockett
LAFSD Representative	Richard Whitmore
Acalanes Parents' Club Rep	
Stanley PTA Rep	Samar Koopah
Burton Valley PTA Rep	
Happy Valley Parents' Club Rep	Kimberly Grover
Lafayette Elementary PTA Rep	Marisa Wilson
Springhill PFC Rep	
Community at Large Representatve	Tom Mulvaney

Community at Large Representatve	Jennifer Perlmutter
Community at Large Representatve	Lisa Spiegler
Community at Large Representatve	
Community at Large Representatve	
Guests - non-voting	
Executive Director	Beth Goldberg
AUHSD Superintendent	John Nickerson
AHS Principal	Travis Bell
LafSD Governing Board	Suzy Pak
LafSD Governing Board	Kenny Tuckerman
LafSD Asst Super, Curr & Inst	Mary Maddux