

# MPAEF Endowment Update

2012-2013



THE ENDOWMENT FOR  
**EXCELLENCE IN TEACHING**  
MENLO PARK-ATHERTON EDUCATION FOUNDATION

## In this newsletter:

Accomplishments

Record Grant

8th Grade Tributes

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- + Raised over \$75,000 in new assets for the Endowment, plus additional multi-year pledges
- + Established 8th Grade Tribute Program
- + Revised Investment Policy Statement - to be presented to Board in Spring of 2014
- + Began working with a global leader in investment advisory services
- + Generated \$115,000 of investment income toward MPAEF Grant

## MPAEF Endowment Contributes \$115,000 toward Record Grant

A grant of \$3.6 million was presented to the District for 2012/2013 and the Endowment contributed a record \$115,000 toward this grant. As the Endowment grows through contributions and investment gains, it will continue to be an important piece of the overall grant. We are truly a community-funded school district, relying on local sources to fund our schools, and the MPAEF and the Endowment are crucial parts of this equation. We are especially proud that 85% of our District families participated in the annual fundraising campaign and the overall grant will make up more than 10% of the District's operating budget for 2013/2014 enabling us to provide the education our community deserves.

## Have a graduating 8th grader or want to say thanks to a special teacher? Pay them a tribute!

In the Spring of 2013 we began our 8th Grade Tribute Program, encouraging all 8th grade families to direct their annual gifts to the Endowment. This allows parents, grandparents or others to recognize graduating students, special teachers or staff members with a donation in their honor to the Endowment. This is a great way to leave a lasting legacy gift to the District.



The Endowment allows MPAEF to meet the needs of future generations for years to come.

Pictured at our MPAEF 30th Anniversary Event - Dr. Maurice Ghysels, School Superintendent, members of Endowment Event Committee Mari Chazen, Sue Sutherland, Mary Wheeler and Char Singleton.

To donate visit: <http://mpaef.org/donate-to-endowment>

## MPAEF Endowment Performance Review

- The MPAEF Endowment returned +11.0%\* for fiscal year ending 6/30/13, outpacing a diversified index by 10 basis points.
- Over this period, the MPAEF Portfolio tracked closely with the Cambridge Associates Endowment Median return of 11.3% despite holding a much higher allocation to fixed income relative to peers (26% vs. 13%).
- For the calendar year ending 12/31/13, the Endowment returned 13.2%. \*
- An overweight to U.S. Equities helped the overall returns, as US markets outperformed international markets.
- Total Portfolio assets as of 12/31/13 were \$2.68M.

## Portfolio Asset Allocation

The Menlo Park Atherton Education Foundation's Endowment has benefited from the strong global equity returns during the most recent Fiscal Year, ending June 30, 2013, as well as the calendar year return, given the Portfolio's equity orientation. The portfolio's equity allocation was diversified by geography, sector, and market capitalization. Other positions include a dedicated allocation to alternative strategies to help reduce volatility, inflation sensitive strategies to help protect the portfolio from unanticipated inflation, and fixed income strategies to help support the portfolio during periods of deflation.



<http://bit.ly/1f9ciNL>

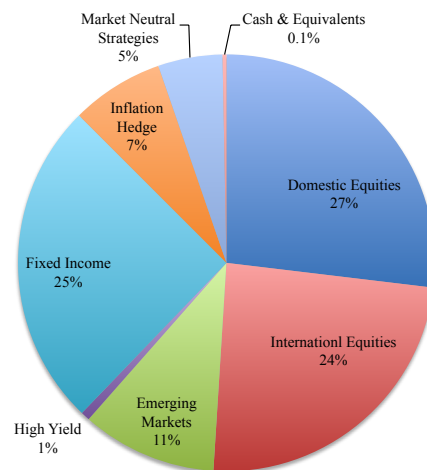


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As of 12/31/13, the portfolio was invested as follows:



## How Endowment Dollars support Excellence in Teaching

Over the summer of 2013, teachers across the District took advantage of an unprecedented amount of professional development.

**Teachers College Writing Institute:** Trainers from *The Reading and Writing Project* at Columbia University's Teachers College provided a five-day workshop to 51 MPCSD teachers. Ten additional staff members attended the Institute at Columbia University in New York for coaching and implementation support. Our writing initiative is growing phenomenally!

**Silicon Valley Mathematics Initiative (SVMI):** Many of our elementary and middle school teachers attended the SVMI Summer Institute to explore the Common Core Standards in Mathematics, looking closely at how to engage students in deep mathematical reasoning and justification of thinking.

**Design Thinking:** As part of our partnership with **Stanford's d.school**, up to 20 more MPCSD teachers teamed up with other Bay Area design thinkers at the d.school to begin prototyping lessons that support K-8 Common Core learning goals.

\*Returns provided by the MPAEF Finance Office and are unaudited.

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