



Valley Forge
Educational Services

CASE STATEMENT

Building for the Future and
Measuring for Success

Advancement Department

rev. 10/28/2011

This Case Statement articulates the aims and purposes for which support is being requested to realize the mission of Valley Forge Educational Services as a leader in Specialized Education.

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I. Aims of Valley Forge Educational Services

Valley Forge Educational Services (VFES) offers a wide variety of educational services focused on guiding children with learning challenges and/or special needs to independence. VFES provides school-based and center-based educational programs and offers clinical services to young children, adolescents, and post high school (18-21) learners through its programs at The Vanguard School, Vanguard Transition Center, The Luma Center™ for Development and Learning, and Summer Matters™. Dedicated to improving specialized education, VFES offers innovative research and advanced practices through its own programs and outreach for professional development and parent education. Part of VFES's mission is to increase the awareness and understanding nationally and globally about children with special needs and to share this experience generously. Valley Forge Educational Services is located in Malvern, PA on a twenty-eight acre campus. VFES is governed by an independent Board of Trustees and is operated as a full service organization led by a highly skilled educational management team. Established in 1959 as a small private school serving children with learning challenges, VFES has grown to become a multi-faceted not-for-profit 501(c)(3) organization.

Our Mission

- To provide a high quality education, serving students who have special needs on many varied levels, and to provide a full spectrum of educational and support services with the goal of unlocking students' potential thus enabling them to become successful learners and contributing members of society.
- To increase the awareness and understanding nationally and globally about children with special needs and to be acknowledged as experts, leaders, and innovators in the art of special needs education and to share this expertise generously.

In Service to Our Mission

Valley Forge Educational Services offers educational services to students, families, professionals and organizations through its four programs, all focused on guiding young people with special needs to independence:

- **The Vanguard School** serves students ages 4-18 whose exceptionalities include autism spectrum disorders, neurological impairment, and related social-emotional difficulties. On-site related services are tailored to each student's needs and integrated in the school day.
- **Vanguard Transition Center** serves students ages 18-21 and prepares them for post secondary education, career development, and social and life skills development. Community-based vocational training is offered. Some students attend classes at area colleges.
- **Summer Matters™** offers innovative summer learning programs to youth and young adults ages 6-21 along with weekend retreats, school break excursions, and respite programming.
- **The Luma Center™** offers therapeutic services, tutoring/academic support, social skills groups, early learning groups, and private consultation to families of children with learning challenges.

As part of its mission, VFES also shares expertise and promotes the exchange of ideas. We offer a professional development program for professionals on campus and in the community, as well as a parent learning series. For 2011-2012, VFES Professional Development and Outreach topics include bullying prevention and All Kinds of Minds training. The organization welcomes student teachers and clinicians-in-training to campus. VFES has partnerships with organizations such as HOPE for Kids and Lavner Camps and Programs. Community awareness of VFES' clinical expertise has resulted in requests from mental health agencies, local universities, preschools, public schools, and families for training and consultation. VFES recognizes the importance of recreational opportunities for students when school is not in session. Students and parents who seek overnight or school holiday recreational programming are able to register for respite activities offered through VFES' Summer Matters™ program.

II. Valley Forge Educational Services Accomplishments

When Dr. Milton Brutton founded the "Main Line Remedial Education Center" in December 1959, he probably did not envision that the small school (in a private home) would become a

recognized leader in specialized educational services. However, his passion for education and the need for this “new” kind of education were contagious. The heritage that Valley Forge Educational Services has received is a prestigious one with many distinctions.

In 1963, The Vanguard School, one of the educational programs of VFES, became the first school in the State to be approved under Enactment of Act 318, which provided partial tuition assistance for children whose educational needs could not be served in their local public schools. The period of 1966-1973 saw significant expansion as the educational models were implemented in places such as Florida, North Dakota, and Canada. The success of our programs became even more recognized in 1975 by a feature on the CBS television program “60 Minutes.”

Instruction and a specific program for children with subtle learning differences were brought into VFES’ family of services by Dr. Milton Brutton in 1977. Crossroads was a pioneer in the field and operated successfully for more than 30 years, benefiting many students. As a small school serving a narrow student profile, over time the difficult economy and increased competition from other schools led to the decision to suspend operations. Today, students with similar profiles continue to be served by other VFES programs.

Further growth was achieved in the decade of the 1980’s as a post graduate program was initiated to help students transition to the work force and gain greater self-sufficiency.

In addition to other programmatic enhancements such as the establishment of an Extended School Year and a Pre-School, construction of the media center, gymnasium, and the state-of-the-art John D. Wilson Children’s Center for occupational therapy was completed. The refurbishing of the Jarmon Center (2006) enabled the creation of a fine arts and industrial arts studio.

In 2008, Summer L.I.F.E., ESY at The Vanguard School and Summer at Crossroads, began operating under the auspices of Summer Matters™. The programs have been expanding to serve more youth each summer.

The Luma Center™ for Development and Learning opened (2010) to serve a range of children, both those who have diagnoses and those who have not been diagnosed, who are experiencing challenges in motor, self-regulation, speech, play and/or academic skills.

The Vanguard Transition Center opened (2010) to prepare students 18-21 for post secondary education, employment and independent living. The Vanguard Transition Center (VTC) is licensed under The Vanguard School.

In 2011 construction was completed on the 6,300 sq.ft. Education Center/Cafeteria building. With the opening of the 2011-20112 school year, all Vanguard Lower School students moved out of various small annex buildings and into the Milton Brutton Educational Complex, marking the first time ever that the lower school program is operating from one elementary school building.

From the beginning until the present day, Valley Forge Educational Services has been a leader in providing quality education to children who learn differently. The teachers and professionals who lead and guide the programs are passionate and dedicated; 18% have served for over 15 years and the average length of service is 7.25 years. Over 38% of instructional staff members have advanced degrees. They remain current in their fields and apply their acquired educational knowledge in the classrooms.

The success, visibility, and credibility that Valley Forge Educational Services enjoys today are a testament to dedicated staff, visionary leadership, and generous benefactors over its fifty-two year history.

III. Direction for the Future

As an organization we are more diverse and as we unify all of our programs under the Valley Forge Educational Services' mission, we recognize that each program needs its own autonomy to work toward this mission. VFES continues to grow and to serve children despite challenging

economic conditions. The support of our donors makes it possible to maintain the high quality programs for which VFES is known.

VFES' new Education Center/Cafeteria, constructed in 2011, was a major improvement to campus infrastructure. It includes flexible space for student and faculty dining and a state-of-the-art teaching kitchen where students will learn vocational skills in the culinary arts. The new 6,300 sq. ft. building was designed in accordance with the guidelines of a LEED project (Leadership in Energy and Environmental Design). The facility will also be used to host events, including conferences and workshops. Students will be offered training in food service through the ServSafe® Food Handling training program, an industry-standard licensing program.

The Vanguard School:

The School is in its 52nd successful year of operations, with 200 students enrolled. Students come from 55 school districts in and around the Delaware Valley. While a significant portion of student tuition is funded by school districts and the state, donor contributions enable the School to offer additional student activities providing life skills and recreational opportunities that enhance the curriculum and are otherwise unavailable with state funding.

Vanguard Transition Center:

Last year, ten students enrolled in the Post Secondary Education cohort were accepted to and attended college classes at Montgomery County Community College, Delaware County Community College, Harcum College, and Bucks County Community College. More than 43 students participated in Community-Based Vocational Training at nine different sites, including White Horse Village, Boscov's, QVC, USLI, and Sodexo Food Service at Eastern University.

Summer Matters:

VFES' "Special Kids" Camp Expo, now in its 4th year, gives families in the community a chance to explore the variety of academic, therapeutic, and recreational camps and programs for youth with special needs. Summer Matters' summer learning programs continue to grow, with an increasing proportion of students coming from the community. These programs offer a respite for caregivers and an opportunity for students to practice social and independent living skills in a supported environment.

The Luma Center™ for Development and Learning:

The Center continues to expand its offerings with new early learning programs such as the Nemours BrightStart! early literacy curriculum, designed for children at risk for dyslexia, and Speech and Language Explorers, a preschool program for children with identified speech and language needs such as apraxia. The center also offers tutoring/academic support services, therapeutic service, and social skills groups.

Supporting VFES and its Programs:

Financial support is essential in order for VFES and all of its aforementioned programs to maintain existing services, to develop additional options, and to emerge as the beacon for others to follow. There are many ways to support VFES' mission to provide high quality education, serving students who have needs on many varied levels. Opportunities are available to donate to VFES as well as to designate donations to benefit The Vanguard School, The Vanguard Transition Center, The Luma Center™ and Summer Matters™. A solid advancement program is built upon the three areas of philanthropy: annual, capital, and deferred giving. However, there are many ways to offer support each program as explained below.

Annual Appeal

The Annual Appeal, which runs between July 1 and June 30, provides funding for the annual operating budget and each gift, no matter how large or small, helps ensure the financial health of our organization. Gifts may be general or restricted to a particular objective that has been identified.

Planned Gift (Deferred Giving)

Planned gifts can benefit Valley Forge Educational Services and its programs while helping you to save taxes, increase your income, and pass more on to your heirs. Planned Giving opportunities include bequests and Life-Income Gifts.

Other Ways to Give

- Stock: Your gift of appreciated stock can provide you with specific tax advantages. If you choose to donate appreciated securities, your broker may transfer the stock electronically to the

VFES' brokerage account. Please notify the VFES Advancement Office of your intent to transfer stock and consult your attorney, accountant or tax advisor for assistance with your philanthropic plans.

- Matching Gifts:** Many corporations will match on a 1:1 or 2:1 basis, the contribution their employees make to Valley Forge Educational Services. Interested persons should contact the Advancement Office or their employer.

- United Way Donor Choice:** Simply go to the United Way website and select the Donor Choice option for The Vanguard School (01260).¹

- Pennsylvania Educational Improvement Tax Credit:** The Educational Improvement Tax Credit (EITC) authorizes the award of tax credits to businesses that make contributions to approved scholarship organizations such as schools or educational improvement organizations. Under this program, business owners and corporations have the unique opportunity to give support and receive tax credit of up to \$100,000. VFES is included on the list of approved scholarship organizations under the EITC Program, and these funds are earmarked to provide much-needed financial assistance to special needs children. More information, including the single page application to register for the program, is available from the Advancement Office or on the EITC website (www.newpa.com). Please consult your tax advisor in order to maximize the tax benefits of this program.

- Gifts In Kind or Real Property:** In certain circumstances, Valley Forge Educational Services will consider accepting other gifts or tangible personal property. As with gifts of long-term appreciated stock, the donor is usually entitled to a charitable deduction for the fair market value of works of art, rare books, stamp or coin collections, etc.

- Grants:** The ability to secure grants from family and corporate foundations will also advance Valley Forge Educational Services well into the future. Government grants also are a source of funding whose potential has not yet been fully realized.

¹ VFES is in the process of trying to obtain specific donor numbers for the various programs.

Although VFES has many opportunities for people to give regularly, the Annual Appeal is the key to an integrated advancement program.

IV. Urgent Planning Objectives (\$150,000)

In every non-profit organization that provides education, personal services, and consultation, there is always a need for funding support on a year-to-year basis. The required tuition and fees never adequately cover the costs of all of these goods and services.

For the 2011-2012 fiscal school year, VFES has identified the following areas where donors can provide support:

Vanguard School

\$25,000 Technology Upgrades
These funds will be used to install cutting-edge technologies in the classrooms, including interactive whiteboards, projectors, software suited to meet the needs of students and online subscriptions to educational content.

\$30,000 Program Enhancements
Soundbeam equipment will be purchased for students' music programs. Funds will be utilized for students' extracurricular activities such as assemblies, life skills and cultural field trips and recreational programs that enhance the curriculum.

Vanguard Transition Center

\$30,000 Technology Library
Funds will be used to acquire digital notepads, assistive technology applications, and necessary accessories to meet the needs of our 21st Century learners and their unique challenges.

Summer Matters

\$25,000 Camp and Respite Supplies
Purchase of new equipment and supplies to ensure that camp and respite programs offer high-quality educational programming.

Luma Center

\$5,000 Program Enhancements

Acquire the most recent version of testing materials and resources to identify the needs of diverse learners. Create a lending library to ensure that families have access to up-to-date and pertinent information to support their children's education.

Valley Forge Education Services

\$20,000

Professional Development

Offer high quality professional development to our faculty and staff in the All Kinds of Minds curriculum. All Kinds of Minds programs aid teachers in identifying students' learning styles and strengths, so that the most effective instruction can be planned.

\$15,000

Technology Upgrades

Upgrade the campus to a new wireless network infrastructure to enable greater coverage, enhanced functionality and ease of management as staff work together to provide educational services for students.

V. Plan of Action

Building for a Bright Future and Measuring for Success

Valley Forge Educational Services is deeply dedicated to serving families and young children, adolescents and pre-21 adults. Recognizing that donors may have an affinity to a specific program, donations may be solicited and “earmarked” to benefit The Vanguard School, Vanguard Transition Center, The Luma Center™, or Summer Matters™ as well as VFES. As we build for the future, even more emphasis is being placed on measuring for success. Strategic planning, research and evaluation are necessary to continue to provide the best educational and support services, with the goal of unlocking students' potential to become successful learners and contributing members of society.

Advancement Committee Responsibilities

The Advancement Committee, as an extension of the Board of Trustees, assists the Board in achieving greater participation and funding. The Advancement Committee will work with the Board, administration, staff, donors, friends, and the Advancement Office in planning and implementing development policies and strategies for the advancement of VFES. Comprised of a diverse membership, the Committee is better able to fulfill its duty to help communicate the

mission and plans of VFES, assist in planning for the future, and take action to make the vision of VFES a reality.

VI. Board Sponsorship

The Board of Trustees at Valley Forge Educational Services realizes that Advancement is one of the many important responsibilities it must fulfill. The Board's full endorsement of an Advancement Committee in no way abdicates the Board's role, but rather enables it to more keenly provide the oversight needed in this most important of areas.

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Mrs. Lori Stauffer - Advancement Assistant
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Appendix: Frequently Asked Questions

Q: Can a person give money to any of the educational programs (i.e., Vanguard or Summer Matters) directly, or does it have to be given only to VFES?

A: Annual Appeal donations may be restricted to the program of choice: Valley Forge Educational Services, The Vanguard School, Vanguard Transition Center, Summer Matters, or Luma Center. When checks are designated to a specific program(s), funds will be allocated to the annual appeal objectives listed in this document. However, as the registered non-profit entity, VFES will be the name on the receipt for your contribution and all checks must be made payable to Valley Forge Educational Services.

Q: How can I be sure that the money I donate will be used to benefit on-campus programs?

A: Every dollar received is restricted to satisfy the Annual Appeal objectives for which we are seeking funds. The Case Statement can be downloaded from our website at www.vfes.net.

Q: What is the relationship between Valley Forge Educational Services, The Vanguard School, Summer Matters, and the Luma Center?

A: Valley Forge Educational Services is an educational organization which operates several programs on its Malvern campus. These programs are The Vanguard School, Vanguard Transition Center, Summer Matters™, and the Luma Center™. Sharing a campus and administrative functions (i.e., technology, human resources, finance, communications) allows the programs to operate efficiently and provides more choices to families.

Q: Has VFES pulled away from its core competency, school-based education, to become a consulting organization?

A: VFES is committed to serving families and children (young children, adolescents and post high school (ages 18-21) learners). School-based education is the cornerstone of VFES' model. It is also true, however, that VFES is diversifying its offerings and now offers center-based educational services, summer and respite programs, and professional development and outreach. This is being done for two purposes: (1) to expand VFES' community outreach and (2) to develop new revenue streams to reduce dependency on tuition and soft money (e.g., Annual Appeal, EITC, fundraisers, etc.), which are vulnerable to economic vagaries.

Q: Is Vanguard an independent school?

A: The Vanguard School is a licensed APS (approved private school), which means that it has been approved by the Pennsylvania Department of Education for funding purposes. The Vanguard School is a program of Valley Forge Educational Services, a legal entity recognized as a 501(c)(3) nonprofit organization.

Q: Has the educational program at Vanguard changed in any way in the past three years?

A: No, the educational program has not changed. The hallmarks of Vanguard's educational programming, such as small classes, individualized instruction based on I.E.P. goals and benchmarks, highly qualified teachers and instructional assistants, multisensory materials, and an emphasis on a full range of ancillary services (e.g., speech, OT, PT, behavior management, and counseling), remain the foundation of the day-to-day instruction.

Q: What is the relationship between Vanguard and the Vanguard Transition Center?

A: The Vanguard Transition Center (VTC) is licensed under The Vanguard School. It prepares students ages 18-21 for post secondary education, employment and independent living. Most VTC students are graduates of The Vanguard School but some enter the VTC after attending educational programs elsewhere.

Q: Does each educational program have its own distinct mission?

A: As an organization, VFES has only one mission and that is:

- To provide a high quality education, serving students who have special needs on many varied levels, and to provide a full spectrum of educational and support services, with the goal of unlocking students' potential thus enabling them to become successful learners and contributing members of society.
- To increase the awareness and understanding nationally and globally about children with special needs and to be acknowledged as experts, leaders, and innovators in the art of special needs education and to share this expertise generously.

The educational programs, as well as all VFES departments, are strongly purposed within this mission and, as such, each carries a clarifying "purpose statement." Unfortunately, these "purpose statements" are often confused with, or used interchangeably with the concept of a mission statement. However, to be clear, there is only one organizational mission as stated above.

Q: Has VFES found a way to continue serving students with learning differences?

A: Yes, The Luma Center serves a range of students, who are experiencing challenges in motor, self-regulation, speech, play and/or academic skills. Summer Matters offers summer programs which offer academic and recreational opportunities to students with learning differences.

Q: How can I reach the Board with my questions or concerns?

A: The Board Chair, Frank Tait, welcomes your feedback. You can contact him at ftait@vfes.net. The Board Chair will work in conjunction with the CEO to address your questions or concerns.