

# REFUSE TO LOSE

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**Year 1, Final Report**  
**June 30, 2010**



# Background

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- In January, 2010, identifying a potential \$5M impact to SMUSD's budget as a result of CA's current fiscal crisis, SMUSD's Governing Board commissioned a "Refuse to Lose" task force with Jeanie Caldwell, Chair.
  - The RTL Task Force was tasked with:
    - Raising \$5M to offset CA's revenue reduction to SMUSD.
    - Building a fundraising plan that was sustainable for 3-5 years, the estimated duration of the reductions in state revenues.
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# The Strategy: #1 Educate

## Strategy 1: Educate

- Even the most aware of our constituents would have a difficult time following the changes in education funding over the last few years.
- A critical component of our campaign is to provide a thorough analysis of the problem and the solution.

-“A Report to the Community”  
-San Marino Tribune  
-Town Hall Meetings

-Constant Contact  
-Website  
-Volunteers

NELSON MANDELA: Education is the most powerful weapon which you can use to change the world.

Coming off of our very successful Parcel Tax campaign, it was important for San Marino constituents to understand “why” the parcel tax did not resolve SMUSD’s financial situation and what the cuts would do to an SMUSD quality education. Step 1 was an aggressive plan to educate the community.

## San Marino's "Refuse to Lose" Campaign

### A Report to the Community of San Marino

By Lisa Hinchliffe Link and Pegine Grayson Bensinger<sup>1</sup>

March, 2010

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<sup>1</sup> Lisa Hinchliffe Link, an attorney for 23 years, has represented private schools and school districts in the areas of constitutional litigation and labor and employment law. Lisa's exposure to public school financing began when representing the Los Angeles Unified School District in *Rodriguez v. LAUSD* (1986-1992). *Rodriguez* made similar claims to *Serrano v. Priest* (allocation of education funds among school districts (inter-district) was unconstitutional) but asserted that the LAUSD was unequally allocating education funds among schools within the LAUSD (intra-district).

Pegine Grayson Bensinger also received her law degree in 1987. She has practiced civil rights, employment and child care law in both the private and nonprofit sectors. She served for five years as the Executive Director of the Western Center on Law & Poverty, a statewide, nonprofit advocacy organization, and is currently the principal nonprofit consultant of PEG Consulting. Pegine has management and Board-related expertise in administration, fundraising, organizational development, crisis management and strategic planning.

*The authors undertook this assignment not in their professional capacities, but rather as community volunteers, with the goal of synthesizing complex information provided to them by the District, School Board, school sites and Schools Foundation representatives and presenting it in a way that community members can readily understand. They gratefully acknowledge the research, editing, and/or drafting contributions of the San Marino Financial Stabilization Task Force members: Chair Jeanie Caldwell, Shelley Enger, Colleen Fitzpatrick, Brown Ho, Kathie Kellogg, Vanessa Koo, Bob Mauser, Susan McDonnell, Linda Sun, Joel Theedt, Mary Ulin, Jerry Wang, and Karen Witke. Critical background information and editing was provided by the Board of Education, Superintendent Dr. Gary Woods, Assistant Superintendent/ Business Services Julie Boucher, Director of Accounting Vangie Lingat, Schools Foundation Executive Director Colleen Fitzpatrick, and the school site Principals and Assistant Principals.*

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The complete story of  
SMUSD financing.

- What has changed in the last 50 years?
  - The efforts taken to develop sustainable district financing,
  - The impact of the state's anticipated budget cuts.
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# San Marino Unified School District

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In weekly updates, the Board of Education will provide as much detail as possible as it becomes available on the current budget crisis that faces SMUSD and the steps we are taking to protect our high-quality excellence for generations to come.

On Tuesday, February 9, 2010, the Board of Education held their regularly scheduled public meeting. Beginning this week, the Board has incorporated a "Town Hall" format for the first 30 minutes of every public meeting to allow guests to ask questions in a free-flowing manner. The Board was asked to answer or address many questions, particularly as they relate to the impending State budget cuts and its impact on San Marino Unified School District. Tops on everyone's mind was, "what's the plan?" We literally counted down the minutes during the Town Hall discussion until the Board unveiled our "go-forward" strategy. This particular strategy must be a multi-pronged and a multi-year approach intended to protect our District until the State's fiscal crisis has corrected itself.

The Board passed a Resolution stating its determination to mobilize the community and all possible resources to make up for the additional projected State funding cuts of approximately \$5 million. The minutes of the meeting and the resolution are available for [viewing](#).

The Board was presented with a list of 47.3 FTE certificated employees that would receive lay-off notices before the mandated March 15 deadline. Because of the complexities associated with employee seniority and "bumping" rights, it will take at least 10 more days to complete the analysis related to the actual "people" who will receive a layoff notice.

A copy of Resolution 8 is included for your information. This resolution outlines an intention to reduce or eliminate particular services. The list is as follows:

- Elementary (K-5): 16.0 FTE (Full Teacher Equivalent)
- Elementary (6th Grade): 2.0 FTE
- Elementary 6th Grade Computers: 0.2 FTE
- Secondary Athletic Director: 0.2 FTE
- Secondary Art: 0.8 FTE
- Secondary Band/Music: 2.0 FTE
- Secondary At-Risk Counselor: 0.4 FTE
- Secondary Counselor-Middle School: 1.0 FTE
- Secondary Counselor-High School: 2.0 FTE
- Secondary ELD: 0.6 FTE
- Secondary English: 4.0 FTE
- Secondary Foreign Language-French: 0.6 FTE
- Secondary Foreign Language-Japanese: .06 FTE

Constant Contact  
was a critical tool  
in communicating  
the story and  
Progress of RTL.

The most frequently asked question in San Marino today may be “How can it be that after the passage of two parcel taxes and two “Save our Schools” campaigns in recent years, the San Marino Unified School District still finds itself with a projected \$5 million budget shortfall?”

## **SMUSD NOT ALONE IN FACING BUDGET CRISIS – but Perhaps Unique in its Capacity to Avert a Disaster**

“I was thrilled to learn that the San Marino community has raised \$2.46 million towards the \$5 million goal,” said Loren Kleinrock, San Marino High School Principal. “At the high school, this means that eleven full-time equivalent (FTE) certificated teaching positions will be restored and we will be able to open our doors in August. However, the stark reality is that we need both Tier 2 and Tier 3 restorations

The Tribune was invaluable in its coverage of the SMUSD need and the RTL campaign.

The unsung heroes of the San Marino Unified School District are the classified staff, who work behind the scenes to ensure that SMUSD students can learn and play in safe, clean, and productive environments. The unprecedented cuts in State education funding for next year will force substantial cuts in these vital services – which have already been cut to the bone in recent years – unless the District’s Refuse to Lose fundraising campaign succeeds.

### **Refuse to Lose Still Short \$1.87 million – Without it Students will Feel the Pain...**

San Marino Unified School District supporters had much to celebrate this week. For the sixth year in a row, SMUSD has earned the highest Base Academic Performance Index (API) ranking among all California unified school districts – a phenomenal achievement. And the Refuse to Lose Campaign reported reaching the \$3.13 million mark – thereby permitting the restoration of 26 teaching positions and over \$500,000 in classified positions. However, Campaign leaders cautioned against “resting on our laurels,” announcing that up to 21 teaching positions remain at risk. Between lay-offs and anticipated retirements, the remaining budget deficit threatens 13% of the District’s teaching positions. And they say that, in San Marino’s relatively small school district (SMUSD currently employs 154 teachers), students will suffer if these positions are not restored.

# Video: First to Worst and Megan Fox

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- First to Worst: CA education financing; how we got to inadequate funding in public education.
- Humor: helped communicate our message:



Hot for Teachers w/ Megan Fox and Brian Austin Green from Megan Fox

The video is a potential view of what public education might be like with the proposed budget cuts--SMUSD's successful RTL campaign will continue quality education in San Marino.

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# The Refuse to Lose Website

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## Things You Should Know

### Recent San Marino Tribune Series

- [First in the Series](#)
- [Second in the Series](#)
- [Third in the Series](#)
- [Fourth in the Series](#)
- [Fifth in the Series](#)
- [Sixth in the Series](#)
- [Interview with SMSF Bob Mauser](#)

### News and Reports about the Education Crisis Throughout California

- [Refuse to Lose Report to the Community](#)
- [SMUSD Financial Stability Task Force Board Update](#) (March 23, 2010)
- [Superintendent's corner: Common habits of effective teachers](#) (Pasadena Star News - February 14, 2010)
- [San Marino Unified could lay off nearly one-third of its teachers](#) (Pasadena Star News - February 17, 2010)
- [Palos Verdes Unified School District Budget Update](#) (PowerPoint Presentation - February 11, 2010)
- [CA Schools' Long Financial Fall](#) (KPBS - March 23, 2010)
- [First to Worst](#) (a 7-part documentary)
- [Parents vs. the Budget](#) (GreatSchools.org)
- [District Dollars](#) (Balancing the Budget for Davis Schools)
- [California's quality-blind layoffs law harms teachers and students](#) (Los Angeles Times - March 24, 2010)
- [The Case for High School Activities](#)
- [Addressing Long-Term Challenges in the Glendale Unified School District](#)

### Information Available in Chinese

- [Refuse to Lose Report to the Community](#) ([Traditional Chinese](#)) ([Simplified Chinese](#))
- [March 29, 2010 SMSF Letter to Parents](#)
- [Parent Letter for Kindergarten-4th](#)

Kim Halkett worked with Stephen Choi, SMUSD Technology Director, to establish an RTL website that chronicled the success of the campaign, as well as served as a repository for important information about CA's proposed cuts and our many educational communications.

# Town Hall Meetings

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Gary Woods, Andy Barth, Jeng Yen, and Jeanie Caldwell presented the RTL story in 3 Town Hall meetings.

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# The Strategy: #2 Fundraise

## Strategy # 2: Fundraise

- SMSF is undertaking a \$2.4M additional fundraising challenge for this year.
- Their “ask” is \$2000 per student.
- The SMSF directors have changed their ongoing “ask” from \$1000 per student to \$2000 per student to support the multi-year expectation for the deficit.



WINSTON CHURCHILL: We make a living by what we get, but we make a life by what we give.

## Fundraise, c'td

- Chinese Club
  - Mid Autumn Festival donation
  - Golf Fundraiser, and
  - Significant donor effort
- Alumni Association
- Major Donors
- PTA's
  - Concert in the Park



THORNTON WILDER: Money is like manure; it's not worth a thing unless it's spread around encouraging young things to grow.

# SMSF

SMSF developed excellent materials in support of their RTL campaign effort. They raised \$2.4M and achieved a 50% participation rate among district families. In addition, to district family donations, a substantial sum was donated by community members.

Thank you to SMSF Bob Mauser; SMSF staff, Colleen Fitzpatrick and Johann Diel, and to Susan McDonnell and Joel Thevdt for the leadership they provided in the SMSF RTL effort.



## *Refuse to Lose our Outstanding Schools!*

Due to the State Budget crisis, our District is facing a \$5 million deficit for each of the next three years. These budget woes are not unique to San Marino. All California public school districts are facing devastating cuts. In response to this funding crisis, the San Marino Unified School District School Board created the Financial Stability Task Force. Along with several other community stakeholders including the PTAs, San Marino High School Alumni Association, Chinese Club of San Marino and District staff & teachers, the San Marino Schools Foundation, has come forward to help the Task Force solve this funding problem through a multi-pronged district and community wide effort.

For its part the Foundation is trying to raise **\$2.4 million by June 1, 2010**. This amount, along with those raised from the other stakeholders' efforts, will give the School Board a better chance to ensure that the programs and teachers at all of our schools will be there for our children in the 2010-11 school year.

We need all parents to consider making a tax-deductible donation of **\$2,000 per student**, because we simply must "Refuse to Lose" our outstanding schools. We need to get as much participation as we can. This crisis affects not only our schools but also our local community.

We need you more than ever to ensure the quality of education that San Marino expects of its schools remains at that very high level. If we are not successful with this effort, San Marino schools will look markedly different, quite frankly, they will be decimated next year. In order for your gift to help with this crisis, we need your donation prior to June 1<sup>st</sup>.

### San Marino Schools Foundation "Refuse to Lose" Campaign

- My check for \$ \_\_\_\_\_ is enclosed payable to SMSF.
- Charge my credit card:  Mastercard or  Visa \$ \_\_\_\_\_  
Card # \_\_\_\_\_ Exp. Date \_\_\_\_\_
- Signature: \_\_\_\_\_
- Parent/Guardian Name: \_\_\_\_\_
- Student Name: \_\_\_\_\_
- Address: \_\_\_\_\_ Email: \_\_\_\_\_
- City, State & Zip: \_\_\_\_\_ Phone: \_\_\_\_\_
- This pledge of \$ \_\_\_\_\_ is for April to June 2010.
- I/We prefer to be billed \$ \_\_\_\_\_/month
- Do not include my/our name in any published lists.
- Do not give me/us Yard Sign recognition in May 2010.
- Corporate matching gifts program can significantly boost your donation to the Schools Foundation. Check with your Human Resources Office and enclose the necessary forms.
- Expect a corporate matching gift from \_\_\_\_\_

Donate on-line!  
on the  
Foundation's website:  
[www.smsf.org](http://www.smsf.org)

The San Marino Schools Foundation is a 501(c)(3) non-profit corporation; donations are tax deductible. Donations may be mailed to SMSF, P.O. Box 54854, L.A., CA 90074. All other correspondence may be directed to SMSF, 1665 West Drive, San Marino, CA 91108. 626/200-7014. [www.smsf.org](http://www.smsf.org)

The San Marino Schools Foundation solely funded this flyer  
WEB

# SMSF

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**The BETTER Deal...**

State Funding	Community** Stakeholders	YOU	Cost of a San Marino Public Education per child			
\$4,600	+	\$2,300	+	\$2,000	=	<b>\$8,900</b>

**VS**

State Funding	Community Stakeholders	YOU	Cost of a Private School Education per child			
\$0	+	\$0	+	Up to \$30,000	=	<b>Up to \$30,000</b>

**Refuse to Lose**  
**Donate by June 1st**  
<http://www.smsf.org>

\*\*includes funds from Parcel Tax, PTA allocations, Major Donors, Alumni, District Staff commitments and concessions

# SMSF

## The NEW Reality...

**\$5,000,000** =  
Budget Deficit

Science  
Reading Lab Core Teaching  
Wind Ensemble Musical  
Advanced Orchestra ELD Dance Computer Programming  
Math French Low Class Sizes  
Instrumental Music Yearbook Honors/AP Classes  
Choir UC requirements 6 periods/ day  
Speech & Debate Algebra A or B Drama Statistics  
Journalism Japanese AP Economics  
AP Government Chemistry

## Refuse to Lose

**Donate by June 1st**

**<http://www.smsf.org>**

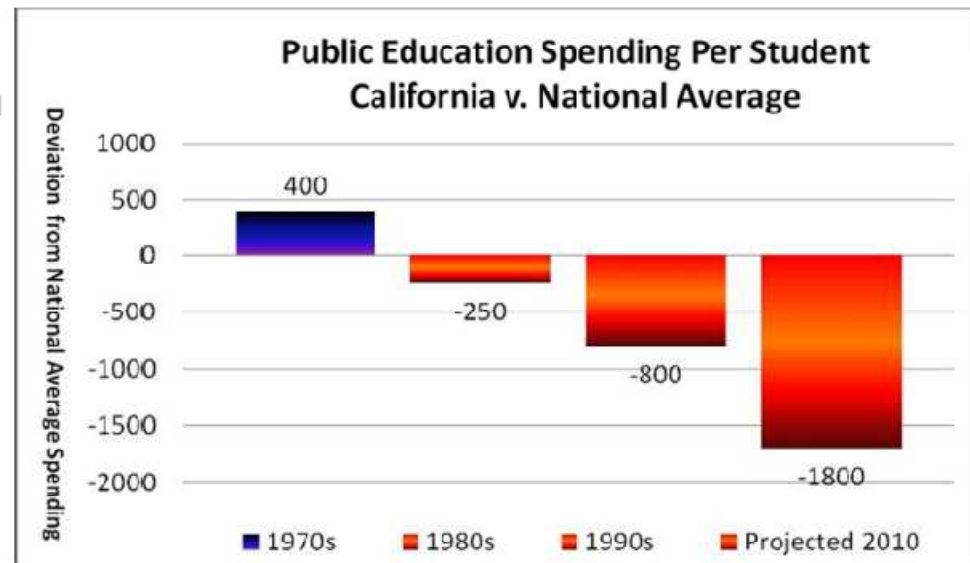


# What we knew...

- Public education is not FREE
- QUALITY public education in San Marino = \$8,900 per child
- Before this budget crisis, the State provided \$6,400 per student
- The remaining \$2,500 per student came directly from parents and the San Marino community through the Parcel Tax, PTAs and San Marino Schools Foundation.

# The NEW reality...

- The District faces a **\$5,000,000** deficit
- QUALITY public education in San Marino is **STILL** = \$8,900 per child



- ***The State, is only expected to provide about \$4,600 per child (2010-11).***

## Doing nothing about this NEW Reality would mean:

- A radical change in the way the schools in San Marino would look, feel and operate.
- Less programs provided for all students
- Larger numbers of students in the classrooms
- Eligibility of San Marino graduates to move on to 2 and 4 year Colleges and Universities may be affected
- The San Marino community as we've known it would no longer be the same.

# Refuse to Lose...

We need all parents to consider making a tax deductible donation of **\$2,000 per student**. This crisis affects not only our outstanding schools but also our local community. We need you more than ever to participate so we can ensure that the quality education we expect for our children is protected and remains at a very high level. **In order for your gift to help, we need your donation prior to June 1st.**



San Marino Schools Foundation  
(626) 299-7014      [www.smsf.org](http://www.smsf.org)



# The Strategy: Optimize

## Strategy 3: Optimize

- SMUSD and its constituent support groups have resources that will be re-purposed or re-engineered to “bridge the gap.”

- Stoneman
- PTA Budgets/Allocations
- Employee Commitments
- Existing Rental Contracts



[GEORGE PEABODY](#): Education: a debt due from present to future generations.

PTAs at all 4 sites committed at least \$100K per site to the RTL campaign. Staff concessions/pledges equaled \$270K in contributions. And, the Board and district staff made substantial progress on the optimization of the Stoneman asset as well as substantial expense reductions, largely through aggressive retirement plans.

# Chinese Club

The Chinese Club did an extraordinary job of designing forums for the RTL education of its constituents. Thank you to its members and to Brown Ho for their leadership and contributions.

The Chinese Club also assisted the campaign with translation of all documents, including the lengthy "Report to the Community;

聖瑪利諾“拒絕認輸”籌款活動  
給聖瑪利諾社區的一份報告。”

Thank you to Jerry Wang and Vanessa Koo for this extraordinary effort.

PRESENTED BY CHINESE COMMUNITY/CLUB OF SAN MARINO

COFFEE AND FUND RAISING TO SAVE OUR SCHOOLS

**Purpose:** To save our schools, proposed fund raising coffee for San Marino School Foundation.

Including (1) Parent donor coffee (2) Major donor Coffee (3) Senior donor coffee (4) Chinese School PTA coffee

**Dates:** proposed dates of coffees on 3/28 (Sunday), 4/18 (Sunday), 5/2 (Sunday), 5/16 (Sunday).  
2:30pm to 5:00pm

**Speakers:** Dr. Jeng Yen ( or at least one from School Board), Jeanie Caldwell, Bob Mauser, Jerry Wang, Linda Sun.

**NOTE:** CCSM collects checks that payable to "San Marino School Foundation"

- (1) Starting with each Co-Chair, each invite 10 supporters and branch down. Major donor invite 3 supporters and branch down.
- (2) Co-chairs for parent donors: Alice Khau (CCSM director) and Jesse Hong (CCSM director), including Valentine, Carver, HMS, and High School.
- (3) Co-chairs for major donors: Brown Ho (CCSM president), Dr. Oscar Chien (CCSM VP), Cindy Chen (CCSM VP)
- (4) Co-chairs for senior donors: Teresa Chiang (CCSM principal 2001-07 ) Cindy Chen (VP)
- (5) Co-chairs for Chinese School PTA: Lindsey Huang (PTA President) and Zehra Sun (PTA VP)
- (6) Chinese Club assist the coffee for setting, snacks and drink, donor information, follow up and collecting checks. (Event treasurer: suggested Eva Jen)

# Celebrate the Arts

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Visual and Performing Arts programs are often the first to go in challenging budget environments. Bonnie Hanson, in her 2<sup>nd</sup> annual "Celebrate the Arts" event, led an effort to showcase the arts programs. Staff across the district assisted her turning it into a great fundraising event, earning \$33K for RTL.

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# Student/Community Connections

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2009-2010 CARE Program Advisory Committee
<u>Administrators</u> Mary Johnson • Loren Kleinrock • Mike Mooney
<u>Teachers</u> Barbara Barbarics • Scott Barton • Howard Cheung • Wyeth Collo • Kenneth Dee Andrew Gayl • Deborah Hart • Cec Keeton • D.R. Moreland • Peter Paccone • Russel Silver • Kerry Witzeman
<u>Student Support Services</u> Kathy Blanton • Rosie Burkhardt • Jose Caire • Vita Fan Eve Estrada • Laura Ives • Jenifer Lozano • Donna Mann • Shanna Soltis
<u>Students</u> Derek Barker • Scott Farley • Julie Fedail • Anrapali Gokani Vanessa Greenleaf • Timothy Han • Courtney Kwan • Charles Lin • Mary Regalado • Oscar Wang • Rachel Wood

Recognizing the importance and value students and seniors receive through shared experiences, high school teachers, staff and students designed and Implemented a program to encourage those relationships. Already, group trips to the Pasadena Distinguished Speaker Series, cell phone programming, etc. have begun throughout our community.

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# Certificated Concessions Request

April 19, 2010

Dear Certificated Staff,

Proposed program and staffing reductions to the San Marino Unified School District budget in 2010-11 will undeniably have catastrophic consequences for schools, students and employees. The Board's Financial Stability Task Force has developed a plan for addressing this unprecedented shortfall, which calls for your support.

As many of you are aware, the District is facing a \$5 million dollar deficit for 2010-11 school year. This crisis, if left unaddressed, will impact every employee. The Financial Stabilization Task Force has enlisted the support and assistance of a variety of stakeholders in an effort to help bridge the gap by developing "buckets" to be filled by each identified group. Our typical fundraising efforts focus on PTAs, district families and community members. This hole; however, is just too large. We must ask for employees to help us. We ask that SMUSD employees contribute a minimum of \$500,000+ to assist the Task Force in meeting their goal.

On March 9, 2010, CSEA represented employees agreed to take up to six furlough days and extend their salary freeze for 2010-11. Additionally, the District's administrators, managers, directors and unrepresented employees agreed to extend their salary freeze, reduce the number of paid holidays received and take three furlough days, for a total anticipated 2010-11 savings of \$250,000. We're almost there; it is our hope the remainder will be filled by certificated staff. If every teacher this year pledged to donate \$162.00 tenthly to the San Marino School's Foundation, we would meet the goal. This amount is TAX DEDUCTIBLE\*, and for your convenience can be collected through payroll deduction by completing the appropriate form. A form is attached to this letter for your convenience.

As you evaluate your ability to assist, please note that many teachers will receive a 3.5% increase related to step movement next year. As an example, if you are on Column V, Step 11 and are moving to Step 12, you will receive a \$2,474 increase. Since this additional money has not yet been built into your personal budgets, we hope that you'll agree that it can be forgone in these economic times. As the families in our community have faced significant reductions in their own personal incomes, your willingness to forgo your step and column increases would be well received and greatly appreciated—especially as they are asked to contribute an additional \$2000 per student to assist us in maintaining our world class education.

We need your help! This burden has been placed on the district by unprecedented economic times and what can only be called a broken state infrastructure. We ask you to help us shoulder this burden. Please join us in our effort to protect and preserve as many certificated employees, programs and resources as we can by pledging your support today to donate a minimum of \$162.00 tenthly to the San Marino Schools Foundation.

Teachers and specialists are a critical part of our immediate and long term success, and the community is grateful for all that you do to provide an excellent educational experience for our students.

Thank you.

Very truly yours,


Jeanie Caldwell, Kathie Kellogg, Bob Mauser

Although certificated staff had a contract for 2010-11, many "gave back," contributing pledges and donations to RTL.

Note: Classified Staff and Administrative Employees agreed to Additional across the board concessions in support of the RTL effort.


# The Strategy: Politicize

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We the People  
VOTE

## Strategy 4: Politicize



**REFUSE TO LOSE!**  
CELEBRATE  
SAN MARINO SCHOOLS



- Letter writing; State and Federal Representatives
- Face to face lobbying
- Leverage other local school districts to strengthen our message.

• **MARIAN WRIGHT EDELMAN**: Education is for improving the lives of others and for leaving your community and world better than you found it.

- Led by Mary Ulin, a petition with over 1000 signatures noticed local representatives of the impact to SMUSD as a result of the anticipated state cuts to education as well as the impact of deferrals.
  - Mike Eng introduced a Proposal for Jobs aimed at minimizing the budget impacts in education.
  - Representatives within the federal government are proposing similar “jobs” legislation aimed at keeping teachers in their jobs.
  - Chris Norgaard and Mary Ulin continue to work to minimize CA cuts to education and to encourage the federal government to provide support to CA’s public education system to avoid the on-going impacts of the state’s proposed cuts.
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# RTL Message to Legislators:

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- As the State budget crisis has continued, deferrals have been added, increased, or lengthened since 2002. In February, 2008, the legislature started to impose a series of on-going deferrals. As of March 2010, the State Controller, Treasurer and Director of Finance can alter the deferrals by up to 90 days. The cash deferrals are now a "moving target." Deferrals have been the key to improving the State's cash situation but have become a huge challenge for school districts.
  - **The current deferrals have been imposed on top of the currently projected budget cuts.**
  - The total of State funding deferrals for the San Marino Unified School District (SMUSD) is \$5.7 million. With a budget of \$29.5 million, we simply cannot afford to absorb a deferral of 20 percent of our total budget. We have experienced challenging times in meeting our payroll requirements this year. Unlike larger districts, the San Marino Unified School District receives very little categorical funding, and we have limited funding sources from which to borrow.
  - **Please take the time to let our elected representatives know that the deferrals are hurting our district.**
  - The unfortunate reality is that the State is as desperately looking for money as we are. The needed reforms to education funding are extremely complicated and will require systemic changes. We simply cannot take on that revolution today.
  - **But we can promote legislation to allow small school districts with fewer than 4,000 students be paid their full revenue limit allocation of funds and exempt them from all cash deferral regulations as established by Education Code 14041.**
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# RTL Letter to Assemblyman

The Honorable Mike Eng  
State Capitol  
P.O. Box 942849  
Sacramento, CA 94249-0049

RE: Deferrals of Revenue Limit payments to school districts with less than 4,000 students

Dear Assembly Member Eng:

**I am writing to ask for your help in promoting legislation to allow small school districts with fewer than 4,000 students be paid their full revenue limit allocation of funds and exempt them from all cash deferral regulations as established by Education Code 14041.**

During the 2002-03 fiscal year the legislature amended this section of the law to allow for one-time deferrals of revenue limit apportionment payments to the districts. In February 2008, the code was again amended to allow on-going deferrals. This was the beginning of several legislative actions that further deferred payments to school districts. As of March 2010 the legislature passed and the Governor signed Government Code sections 16325.5 and 16326 which authorize the State Controller, Treasurer and Director of Finance to alter the deferrals by up to 90 days. The cash deferrals are now a "moving target."

The total of State funding deferrals for the San Marino Unified School District (SMUSD) is \$5.7 million. With a budget of \$29.5 million, we simply cannot afford to absorb a deferral of 20 percent of our total budget. We have experienced challenging times in meeting our payroll requirements this year. Unlike larger districts, the San Marino Unified School District receives very little categorical funding, and we have limited funding sources from which to borrow.

SMUSD is the number one ranked unified school district in the state. The quality of education we are able to provide to our students should be the standard, not the exception. The budget decisions made at the state level are bringing school districts like ours to the brink of insolvency. This is not just about numbers, this is about an entire generation of students, future citizens and workers who will be denied the necessary educational foundation to compete in society. In our struggle to do whatever it takes to ensure that our students receive the education they need, we simply must be able to count on "on time receipt" of our already reduced revenue limit funding.

The long-term solution to our K-12 education crisis is for the State Assembly to reform education finance. But more immediately, please consider providing flexibility to small school districts like SMUSD by exempting school districts with less than 4,000 ADA from the deferral of State revenue payments.

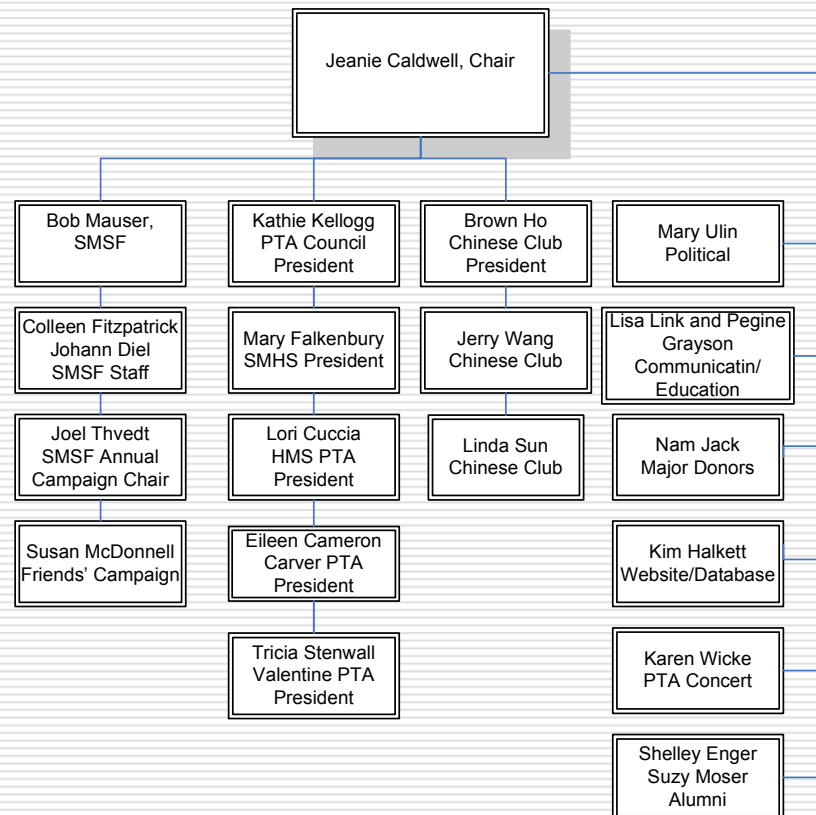
Thank you very much for your consideration of this vital issue for our district, our state and our future.

Sincerely

- While the communication of RTL focused on the impact of cuts to revenue, an ongoing state strategy to reduce revenue obligations in the form of deferring revenue payments to districts also creates challenges for the district.
- A focus of our political campaign was to encourage state legislators not to defer revenue payments to smaller school districts.

# The RTL Team

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- **Many** contributed to the RTL fundraising effort. The referenced individuals represent the “leadership effort.”
  - Without the contributions of hundreds of others, the effort would not have been successful.
  - The organizational strength of each of the represented groups was critical to the campaign’s ability to raise so much in such a short period of time.
  - Special thanks to the Board and district staff for their assistance during the campaign.
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# The Refuse to Lose Goals:

## The Numbers

<b>Fundraise</b>	SMSF	\$2.40M
	Alumni, Major Donors, and Chinese Club	\$1.75M
	PTA Event	\$ 350K+
<b>Optimize</b>	Employee Commitments	\$ 500K+
	PTA Allocations/ Budget Repurposing	\$ 400K+
	<b>Total</b>	<b>\$ 5.4M+</b>



**Note:** For 2010-11, no assumptions were made for add'l stimulus funds, contract re-negotiations and/or Stoneman re-purposing.

- The fundraising effort ***leveraged*** existing SMUSD support organizations.
- Each added or substantially expanded their existing levels of support.
- A sustainable ***multi-year commitment*** was a key objective in the RTL plan.
- “Goals” were selected based the efficiency of resource utilization and the contribution expected as a result of the effort.

# “Buckets” Represented Target Goals

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# The Results, \$4,300,000

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Group/Bucket	RTL Amount
Major Donors Donations- via SMSF	1,000,000
Concessions - Mgmt/CSEA/Non-Repr. Employees	184,292
Chinese Club Donation - via SMSF	100,000
PTA's/PTSA Donations - via District	400,000
San Marino Schools Foundation Donations - via SMSF	2,400,000
Teachers Supporting Teachers Donations - via SMSF	31,500
SMUSD Employee Payroll Pledges - via SMSF	38,540
Refuse to Lose Festival May 1, 2010 - via SMSF	33,696.13
<b>Total - Unrestricted RTL Funds</b>	<b>4,188,028</b>
Plus SMHS PTSA and HMS PTA Donations - Uses TBD	80,000
<b>Grand Total - RTL (Including Restricted SMHS and HMS Donations)</b>	<b>4,268,028</b>

- Through the results of the campaign and aggressive budget management, SMUSD was able to retain the benefits provided to its students by 58 staff members.
  - What is currently NOT in the budget for 2010-11 is 6 period PE at SMHS which may have an impact on the district's athletic programs and/or on-staff coaches.
  - Enrollment numbers for 2010-11 will not be confirmed until ~7/31. Student/teacher ratios are currently 1:28-32 at the elementary levels, pending enrollment confirmation.
  - The Board remains committed to 1:25 at K-3 and 1:30 at 4-5, and once enrollment is confirmed will be working to minimize class size impacts.
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# Looking Forward: 2011-2012

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- ❑ **Concessions**-the community expects substantial progress on the certificated concessions for future campaigns.
  - ❑ **Major Donors**-SMUSD is fortunate to have generous benefactors. This year's major donor "bucket" was achieved through that generosity. It should not be expected that a major gift will renew. However, an additional \$400-500K has already been identified as major gifts money for 2011-12.
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# Looking Forward: 2011-2012

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- **Alumni**-Our alumni effort was more challenging to launch than originally planned. The alumni team is working through the summer with plans to launch late summer/early fall. Future campaigns should include an alumni contribution.
  - **PTA Concert**-PTA Presidents have worked extremely hard to put together this fundraising effort. While not doable for year 1 of the campaign, it is expected to be scheduled during year 2 and will likely be a sustainable fundraiser. In addition, the PTAs will host a Treasures and Trinkets "estate sale" January 28-30, 2011.
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# Looking Forward: 2011-2012

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- **SMSF**-Our campaign was **largely** reliant on the Schools Foundation. Their willingness to accept and achieve a goal of \$2.4M was critical to the RTL campaign's success.
  - **SMSF will contribute ~\$3.4M** (*\$1M in existing general fund commitment and \$2.4M in RTL donations*) to the SMUSD general fund for 2010-11. Although the SMSF "ask" is increasing to \$2K, the participation level must also increase to achieve a similar contribution for 2011-12.
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