



Districtwide Fundraising in SMMUSD

Board Presentation

November 3, 2011

Santa Monica-Malibu Unified School District

Mission Statement

- Extraordinary achievement for all while simultaneously closing the achievement gap.

Vision Statement

- As a community of learners, the Santa Monica-Malibu Unified School District works together in a nurturing environment to help students be visionary, versatile thinkers; resourceful, life-long learners; effective, multilingual communicators and global citizens. We are a rich, culturally diverse community that values the contributions of all its members and strives to promote social justice. We exist to assist all students in their pursuit of academic achievement, strength of character, and personal growth, and to support them in their exploration of the intellectual, artistic, technological, physical and social expression.

Vision for SMMUSD students

- o Strategic Plan 2011-2016: Promote Excellence and Equity
- o A premium program for all students in our district, which includes excellent academic instruction, intervention as needed, extension, enrichment, the arts, rigor—all aspects associated with a rich educational environment
- o To know that all students in our district have access to equity in programs and educational experiences, regardless of which school they attend

Fiscal Realities

- State has reduced what they owe us by over 19 percent
- Funded by the state as if it was 2005-2006
- The impact of those cuts has been mitigated by the contributions of our communities' parcel and sales taxes
- Started economic hardship with healthy reserves and have used those reserves; still have a structural deficit to address

Districtwide Fundraising

- o Districts have moved to centralized fundraising because of the issue of “haves” and “have nots”
- o Clearly a widespread issue—internet searches find articles about centralized fundraising in school districts from Toronto to Santa Monica-Malibu
- o The weekend of October 9, 2011, there were articles about this issue in the Sacramento Bee, San Francisco Examiner, and the Santa Monica Daily Press

Current Status of Fundraising in SMMUSD

- o Santa Monica-Malibu Education Foundation
 - o \$400,000-\$500,000 annually
- o S.O.S. Campaign (total contributions)
 - o \$1,580,361.44
- o PTAs (total raised in 2009-10)
 - o \$3,932,739
 - o Elementary high: \$2,136.59 / student
 - o Elementary low: \$ 96.56 / student
- o Booster Clubs

Student Demographics & Site PTA/ Booster Club Income & Expenditures

<u>School</u>	<u>Students</u>	<u>Socio- economically Disadvantaged</u>	<u>English Learner</u>	<u>Latino</u>	<u>African American</u>	<u>White</u>	<u>PTA Income</u>	<u>\$(Income)/ Student</u>	<u>PTA Expenditures</u>	<u>\$(Expenditure)/ Student</u>
Elementary:										
McKinley	433	41%	35%	48%	3%	30%	\$41,812.00	\$96.56	\$46,181.00	\$106.65
Rogers	512	55%	26%	48%	12%	46%	\$67,090.00	\$131.04	\$61,031.00	\$119.20
Muir	340	39%	13%	34%	12%	36%	\$81,096.00	\$238.52	\$83,184.00	\$244.66
Edison	434	49%	40%	72%	3%	20%	\$167,899.00	\$386.86	\$180,055.00	\$414.87
Grant (Booster Club)	650	27%	8%	28%	4%	65%	\$301,308.00	\$463.55	\$327,311.00	\$503.56
Roosevelt (PTA + Booster Club)	789	12%	5%	12%	4%	75%	\$693,780.00	\$879.32	\$478,275.00	\$606.18**
Franklin	793	5%	12%	2%	5%	78%	\$509,262.00	\$642.20	\$520,146.00	\$655.92
SMASH	221	14%	7%	4%	5%	66%	\$162,248.00	\$734.15	\$149,159.00	\$674.93
Cabrillo	273	19%	13%	19%	2%	70%	\$254,472.00	\$932.13	\$213,914.00	\$783.57
Webster	400	4%	5%	8%	1%	81%	\$424,869.00	\$1,062.17	\$462,479.00	\$1,156.20
Pt Dume	267	2%	3%	10%	1%	79%	\$570,470.00	\$2,136.59	\$534,443.00	\$2,001.66
Middle:										
JAMS	1,039	49.5%	12%	50%	11%	32%	\$74,195.00	\$71.41	\$75,307.00	\$72.48
Lincoln	1,140	18%	8%	17%	5%	59%	\$142,715.00	\$125.19	\$90,850.00	\$79.69
High:										
Samohi	3,106	26%	6%	38%	8%	40%	\$140,165.00	\$45.13	\$156,639.00	\$50.43***
Malibu	1,243	9%	6%	9%	1%	82%	\$301,358.00	\$242.44	\$354,316.00	\$285.05***
Total	11,640						\$3,932,739.00	\$337.86	\$3,733,290.00	\$320.73

IRS Form 990, 2009-10 public information posted on GuideStar (<http://www2.guidestar.org/rxg/analyze-nonprofit-data/index.aspx>)

** Roosevelt PTA & Booster Club filed Form 990s separately - these are the combined totals.

*** These numbers reflect fundraising done by the high school PTAs only. MHS & Samohi totals do not reflect fundraising from school booster clubs.

Instructional Personnel Expenditures*

<i>School</i>	<i>Commitment for Instructional Salaries</i>	<i>Enrollment</i>	<i>\$ per Enrollment</i>
Cabrillo	\$115,000	244	\$471
Edison	\$47,778	457	\$105
Franklin	\$186,185	751	\$248
Grant	\$154,900	610	\$254
McKinley	\$29,000	443	\$65
Muir	\$54,000	290	\$186
Pt. Dume	\$279,400	255	\$1,096
Rogers	\$0	491	\$0
Roosevelt	\$224,200	775	\$289
Webster	\$248,500	340	\$731
SMASH	\$98,000	150	\$653

* Estimates based on 2011-12 current commitment forms

Comparing Instructional Personnel Expenditures* between Two Schools

Highest elem. school expenditure per student

- o \$1,100 / student
- o Instructional aides (\$170,000)
- o Reading teacher (\$12,000)
- o Choral music (\$4,000)
- o Marine science (\$27,000)
- o Reading, primary grades (\$15,000)
- o Reading, upper grades (\$13,000)
- o Art (\$16,000)
- o Reading Recovery (\$22,000)

Lowest elem. school expenditure per student

- o \$65 / student
- o K-2 music (\$4,000)
- o K-5 art (\$5,000)
- o Science teacher (hourly, up to \$11,000)
- o Instructional assistant (\$5,000)

* Estimates based on 2011-12 current commitment forms

Categorical Funding

- o Goal:

- o To *supplement general funds* so that underperforming students have the *ability to reach the academic level* of their not-at-risk peers

- o Targeted & specific

- o Support students who are low-income, academically at-risk, &/or are English Learners

- o Monitored

- o Schools & the district are *held accountable* for appropriate use of these funds and their effect on student achievement

- o Schools that are funded with categorical funds are subjected to the federal categorical system

Other Funds

- o Funds raised by PTA or central fundraising model can be used for *any purpose* deemed appropriate by the district and school site

Equity Fund

- o Created in 2004 to address concerns regarding equity of funding in SMMUSD schools
- o PTAs contribute annually to the fund based on a calculation (discussed at 10/20/11 board meeting)
- o Not all schools have contributed every year
- o District put in difficult position of fund-collector

SMMUSD Council of PTAs Resolution of Priorities (2009)

- o Achievement & equity for *all*
- o Funding: “We feel that the continued reliance of the District on the PTA to provide these core educational services and programs has *negative impacts*, such as:
 - o *Inequity* in the delivery of services, programs and even class size for students across our district.
 - o PTAs needing to focus on fundraising to the *detriment of its core mission* to provide information, advocacy and support to children and families.”



Where is Districtwide
Fundraising Working?

Ed Foundations Raising More Than \$1 Million Per Year

- o Beverly Hills
- o Carlsbad
- o La Cañada-Flintridge
- o Manhattan Beach
- o Moraga
- o Palo Alto
- o Pasadena
- o Peninsula (PV)
- o San Francisco

Manhattan Beach: Before Districtwide Fundraising

- o Disparity in per-pupil PTA funding between west-of-Sepulveda & east-of-Sepulveda schools (\$1500/pupil vs. \$50/pupil)
- o High school PTA unable to fund programs and support services

Manhattan Beach: After Transitioning to Districtwide Fundraising

- o The high school – which draws from outside of the community to include most of Hermosa Beach and a significant number of permit students – has benefited from districtwide fundraising, as they are able to *infuse support into programs* that the high school PTA wasn't able to fund (e.g., their Ed Foundation funds smaller English class sizes for 9th graders).

Manhattan Beach Education Foundation

- *Funds staff* needed to teach programs at school sites *districtwide*
- *Raises funds a year in advance* so that its grants can be included in budget planning process
- Each school's PTA has its own Board of Directors
 - *Raises and spends funds in same school year* to pay for campus-specific enrichment, all technology, school supplies, classroom materials, and current year's operational support staff
- Despite their different roles, both the Ed Foundation and PTA *work together to fund critical programs our schools wouldn't otherwise have.*

<i>Ed Foundation Pays For:</i>	<i>PTA Pays For:</i>
Librarians	Library books
Computer specialists to teach computer skills in the lab	Lab's computers and software

Manhattan Beach: Before & After

- o Before districtwide fundraising:
 - o \$404,314
- o First year after implementation:
 - o \$1,963,497
- o Currently, they raise:
 - o *\$4.6 million*
 - o Funds 67 educators in 7 schools
 - o 84% of revenue comes from parents; 16% comes from non-parents

Palo Alto

Partners in Education (PiE)

- Supports *vital* school staff
- Only fundraising organization permitted to *pay for salaries* during the school day (in-class support):
 - Classroom aides, arts instructors, and science specialists (elementary schools)
 - Student counselors, teacher coaches, and elective teachers (middle schools)
 - College, career and guidance counselors, and career/technology elective staff (high schools)
- *Equitably distributes funds* across district on per-pupil basis
 - Sets target goals
 - Works with principals, parents, and the district office to allocate dollars appropriately

How PiE Works

- o Centralized funding organization that pays for supplemental staff
- o Separate district accounting code for PiE donations
- o PiE gives district check for, say, \$3.4 million; district sends PiE accounting of how funds were spent
- o Sites may not use local donations to underwrite the cost of additional personnel for employment during the school day.

Palo Alto: Before & After

- o Before districtwide fundraising:
 - o \$100,000 (Ed Found)
- o First year after implementing centralized fundraising:
 - o \$1.6 million (All Schools Fund – 2002)
- o Currently, PiE raises:
 - o *\$3.4 million*
 - o 73% of revenue comes from parents; 27% of revenue comes from non-parents (foundations, community/corporations)



Conclusions

Analysis

- o Allowing individual PTAs to raise and expend money to hire staff in SMMUSD is a practice *fraught with difficulties*, and has created:
 - o *Great inequities* across the district during the school day; allows schools to add personnel who may or may not be a part of best practices and/or supportive of the initiatives of the district
 - o A climate in which the instruction and instructional experiences students receive and the conditions in which teachers work are *determined by the amount of money individual PTAs can raise*, rather than a common expectation as a district

Benefits of Districtwide Fundraising

- *Consolidates fundraising* at the district level and moves to a more community-based fundraising effort
- Provides a *consistent revenue stream* for the district in the future
- *Builds synergy* among fundraising efforts and targets larger corporate donors

Benefits of Districtwide Fundraising (cont.)

- o Provides more *equity* among the schools
 - o Important, since most children in the district will pool into the same three middle schools, then into the same high schools
- o Allows for *flexibility* for sites to maintain unique programs
- o Helps *relieve the site PTAs* from having to fundraise for salaries
 - o PTA can return to fundraising for its core activities

Next Steps

- o Update Acceptance of Gifts policy (Supt.'s recommendations)
- o Immediately implement corporate gift-giving aspect of the board policy to assist the Ed Foundation in raising the funds necessary for the full implementation of the policy
- o Superintendent's Advisory Group
 - o Constituted by the first week of January 2012
 - o Meet with districts who have successfully made this transition
 - o Study the issue & details of implementation
 - o Present suggestions/considerations for implementation to the Board of Education by spring 2012 (anticipated full implementation Fall 2013)
- o Update Acceptance of Gifts administrative regulation no later than June 7, 2012 (Supt.'s recommendations)