

**LEAGUE OF WOMEN  
VOTERS  
OF THE  
CLAREMONT AREA**

**LOCAL STUDY**

**PUBLIC EDUCATION  
FINANCING**

**APRIL 2012**

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## **EXECUTIVE SUMMARY**

The story of public education funding in California is long and complex. There have been a number of case law decisions and voter approved ballot measures dating back to the 1960's that have created a maze of parameters under which elected school board members and education administrators must operate.

In order to have informed discussions and look at reasonable solutions, it is important to understand the problem. This report culls facts and information from a variety of sources in an attempt to explain why public education financing in education is so very complicated. Our goal was to look at the problem in its entirety rather than in fragments.

Local school boards have very little discretion in expenditures or revenues. There is no one case law decision, state ballot measure or federal initiative that can be pointed to as a single reason for this. Rather, the cumulative impact of some 40 years worth of erosion of local control and state and federally mandated programs has resulted in public schools being dependent on locally approved revenue measures and fund raising efforts to provide even a minimal funding augmentation in K-12 education. This cumulative impact has been compounded by the economic downturn of the last several years.

All parents desire a solid education in a safe environment for their children. While the definition of a comprehensive education evolves with time, most agree that reading, writing, arithmetic, technology, history, civics, science, the arts and extra-curricular activities are components of a solid education. In today's global world, foreign languages are taking on increasing importance. For students who are not college-bound, vocational and technical career training is critical. Under federal and state law, all young people, regardless of ability/disability, are entitled to a public school education and are expected to reach the standard of proficiency defined by the State.

Parents rely on professional educators, administrators and elected school board members to do this. But to whom do these people turn? On whom or what can they rely in order to fulfill their commitment to educate our young people?

After providing background and historical information, this report looks at a number of "myths" about public education funding, focusing on the Claremont Unified School District. We respond to these myths with facts and figures. Any "editorializing" is a result of the frustrations the study team experienced as we identified and learned about the many legal and voter approved ballot measures that, while well intended, have made the delivery of a solid education such a challenge.

It is our goal that this study provide information to prompt community discussion on solutions.

## **INTRODUCTION**

Last year, the League of Women Voters of the Claremont Area's local study was on the topic of local government financing. This year's study is on public education financing.

We originally planned to look at a number of school districts as well as community colleges. After several meetings, we determined that including other school districts and community colleges was biting off more than we could chew and that community college financing, in particular, was a possible subject for a future study.

We therefore decided to concentrate on K-12 public education financing in California and how it is impacted by both State and Federal legislation and mandates. We also decided to concentrate on the Claremont Unified School District (CUSD) to provide examples and specific information about local effects.

Because the topic of public education financing is complex and complexity often breeds mis-information, we decided to take a "myth busters" approach to our study. Following the Background Section, we have addressed a number of common "myths" and attempted to provide objective facts to respond to those myths.

Recent decisions and proposals have added to the complexity of public education financing and funding for the Claremont Unified School District. They include:

- Measure CL, a \$95 million bond measure for Claremont Unified School District, was defeated by Claremont voters in November, 2010.
- Because State revenues are falling short of what was budgeted for 2011-12, cuts were "triggered" mid-year. These cuts affected CUSD by some \$350,000.
- The Supreme Court ruled that Redevelopment Agencies throughout the State should be abolished. It is unclear at this writing what the impact will be on public education financing. However, it appears that any funds generated for education will not be new funds. Rather, revenues taken by the State from local Redevelopment Agencies will be used as an off-setting revenue source for education funding.
- The Governor has proposed a tax increase for the November 2012 ballot. In the event the tax increase is not passed by California voters, the Governor anticipates cutting K-12 education funding by some \$5 billion state-wide. If the measure passes, education funding will remain flat.

Needless to say, mid-year budget cuts at the State level coupled with the unknowns of Redevelopment Agency funds and the proposed tax increase ballot measure make budgeting at the local school district level an on-going and increasingly uncertain proposition.

In conducting this study, committee members used numerous sources:

- Auditor-Controller of Los Angeles County. Taxpayers' Guide: Tax Rates and Legal Requirements County of Los Angeles, California. 2010-2011. [www.auditor.lacounty.gov](http://www.auditor.lacounty.gov)
- Auditor-Controller of San Bernardino County (website). 2009-2010 Tax Rate and Revenue Report. [www.sbcounty.gov/atc/OnlineDocs.aspx](http://www.sbcounty.gov/atc/OnlineDocs.aspx)
- Best B.E.T [www.claremontchamber.org](http://www.claremontchamber.org)
- California Department of Education Certificated Salary Data
- California Education Code
- Claremont Educational Foundation  
[www.claremonteducationalfoundation.org](http://www.claremonteducationalfoundation.org)
- Ed.gov, the U.S. Department of Education  
<http://www2.ed.gov/programs/titleiparta/index/html>
- Education for all Handicapped Children Act  
<http://sitemaker.umich.edu/356>
- EdSource, a 501(c)(3) California organization established in 1977 to develop and distribute information to clarify complex K-12 education issues [www.edsource.org](http://www.edsource.org); [www.edsource.org/data-districts-pass-parcel-taxes.html](http://www.edsource.org/data-districts-pass-parcel-taxes.html)
- Individuals with Disabilities Act [www.dds.ca.gov/statues/Government](http://www.dds.ca.gov/statutes/Government)
- League of Women Voters United States 2011 report "The Education Study; The Role of the Federal Government in Public Education"
- Legislative Analyst Office  
[http://www.lao.ca.gov/reports/2011/calfacts\\_010511.aspx](http://www.lao.ca.gov/reports/2011/calfacts_010511.aspx)
- Mills, J.I (2008). A Legislative Overview of No Child Left Behind. *New Directions for Evaluation*, 117,9-20.
- Newspaper articles from the Claremont Courier, Inland Valley Daily Bulletin, Los Angeles Times and Sacramento Bee
- Revenues and Revenue Limits, 2011 Edition School Services of California, Inc.
- Welcome to Attendance 2011-12, Claremont Unified School District

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## **BACKGROUND-CALIFORNIA**

Most parents of today's school age children were not alive in the late 1960's and 1970's when public education financing in California witnessed a number of lawsuits and initiatives that dramatically changed how schools are financed. It is important to understand some of the key decisions that resulted in today's complex system of public education financing. A key point to remember is that public education is now financed almost entirely by the State and there is very little local control or local decision making involved regarding finances.

***Serrano v. Priest***, better known as the *Serrano* decision, or simply *Serrano*, was a 1968 case in which John Serrano, the parent of a student in a "low property tax" school district filed a lawsuit against Ivy Baker Priest, then California's State Treasurer.

In order to understand this case, it is important to be aware that when it was filed in 1968, school district revenues were generated from property taxes. As property values increased, so did revenues for schools. A school district with high property values could raise a lot of money per pupil with a relatively low property tax rate while a low-property wealth district could generate only a modest revenue stream, even if it levied a much higher property tax rate. At that time, property tax rates were not limited to 1% as mandated by California's 1978 Proposition 13.

In 1971, the California Supreme Court ruled in favor of plaintiff John Serrano, saying that the discrepancy between high and low property tax districts violated constitutional “equal protection” rights of pupils in low property tax districts. The Supreme Court found that the pupils in low property tax districts were being denied equal educational opportunities.

Rather than redistribute revenues based on a per pupil rate which would have taken funds from high property tax districts and allocated them to low property tax districts causing significant cuts in high property tax districts, **Senate Bill 90**, passed in 1972, established Revenue Limits. These Revenue Limits were based on a formula that looked at a district’s unrestricted state aid and local property taxes, the base revenue limit, to set per pupil revenue known as ADA—Average Daily Attendance. The base revenue limit in subsequent years was set equal to the prior year’s base revenue limit plus an adjustment for inflation. A differential inflation increase was calculated to provide a larger dollar increase per ADA for low-revenue districts.

In 1974, the California Superior Court in Los Angeles County ruled that **SB 90** did not reduce per-pupil funding sufficiently or quickly enough and determined that wealth-related disparities, apart from categorical aids and special need programs, needed to be reduced to an “insignificant difference, less than \$100 per pupil.”

After several years of debate, **AB 65**, which was designed to meet the equalization mandate through a complex series of formulas, was passed. However, just weeks before the scheduled implementation of AB 65, California voters passed Proposition 13 in June, 1978.

While **Proposition 13** slashed property taxes an average of 60%, it also resulted in another round of significant changes in public education financing. Proposition 13 required that property tax revenue be 1% of assessed valuation, generally limited increases in assessed valuation to 2% annually and required that the 1% revenue be shared by all local governments---cities, counties, special districts and school districts. Prior to Proposition 13, Claremont, along with Beverly Hills, San Marino and Arcadia, had one of the highest property tax rates in Los Angeles County and therefore the most funds to support schools and municipal services.

To offset the loss of revenue, school districts had to depend heavily on state aid. Furthermore, school districts were no longer authorized to increase property tax rates for general purposes or operational revenues.

Prior to Proposition 13, a school district computed its revenue limit according to statutory formula and subtracted the amount of state aid it would receive. State aid at that time was based solely on the district’s assessed value per ADA and any difference between state aid and a district’s revenue limit was the maximum

amount a district could raise from property taxes. Post Proposition 13, school districts can no longer set their own tax rate. Rather, after a district computes its total revenue limit in accordance with Senate Bill 90, the district's local revenues from the 1% property tax rate are subtracted to determine the district's level of state aid.

*This shifted the responsibility of revenue generation from local school districts to the state, made public education funding highly dependent on the State's economy, eliminated mandated cost reimbursements for special education and other programs and severely limited a local district's ability to raise revenue.* After Proposition 13, a local revenue measure required 2/3 voter approval. However, under **Proposition 39**, approved by California voters in 2000, local bonds, with some restrictions, may now be approved by 55% of the voters; a parcel tax still requires a 2/3 majority approval. Proposition 39 requires that bond proceeds be used for repair, construction or replacement of school facilities, prohibits use of proceeds for salaries or operating expenses and requires an annual performance and financial audit on the use of bond proceeds.

Immediately following Proposition 13, the State was able to provide a high level of "bailout funding" primarily by spending down a multibillion dollar State surplus. However, by 1982-83, that surplus was exhausted, a recession was causing a reduction in state tax revenues and the Legislature was unwilling to enact a tax increase. Starting in 1983, school funding somewhat improved because the recession was short-lived and a strong grassroots campaign helped forge school finance reform that culminated in the passage of **SB 813**.

**SB 813** called for a longer school year and school day, mentor teachers, increased salaries for new teachers, increased funding for instructional materials and an incentive to provide counseling for high school sophomores. SB 813 also established a statutory Cost of Living Adjustment (COLA) formula for K-12 education and provided equalization aid to raise low base revenue districts to the statewide average.

While SB 813 provided welcomed reforms, it did little to boost California's funding for K-12 education as compared to the rest of the nation. Even with the start of the State Lottery in 1985-86, California dropped further below the national per student funding average. In 2009-10, California ranked 45 out of 51 states (including the District of Columbia) in ADA funding, according to the National Education Association.

By 1987, K-12 education supporters were extremely frustrated with annual battles with the State. The education community placed **Proposition 98** on the ballot in 1988. With voter approval of Proposition 98, K-14 education was to receive a constitutionally protected portion of the State budget as well as additional funding from any future state revenues collected in excess of the Gann limit.



The Gann Limit, **Proposition 4**, approved in 1979, had limited the allowable growth in state and local government spending, including school districts. Prop 4 called for an allowable inflation factor equal to the annual percentage change in the U.S. Consumer Price Index (CPI) or annual percentage change in California per capita personal income, whichever was less. The California per capita income grew by 113% from 1978-79 through 1989-90 but the Prop 4 limit allowed for an inflation growth of only 84%.

Propositions 98 and **Proposition 111** (1990) amended the Gann limits and eliminated this inequity. Proposition 111 redefined the inflation factor for use in Gann limit calculations. It focused on the annual percentage change in California per capita income instead of the lesser of the U.S. CPI or California per capita income.

In 2000, the case of **Eliezer Williams et al v. the State of California** was filed as a class action lawsuit in the San Francisco County Superior Court. In this case, plaintiffs accused the state of failing to adequately provide appropriate learning environment, appropriately credentialed teachers and sufficient textbooks for K-12 pupils. Then Governor Schwarzenegger, rather than contest these charges, agreed to settle the case out of court.

Under the settlement provisions, schools that performed in the lowest deciles in the state's 2003 Academic Performance Index (API) received additional funding in the amount of \$138 million in 2004-05 for instructional materials and an additional \$800 million over a series of years for facility improvement. The Williams settlement also requires all schools to provide sufficient textbooks and instructional materials for all students and also requires schools to post notices for how complaints may be filed concerning facilities, teacher credentialing and textbook problems.

In 2004-05, faced with a difficult budget year and significant obligations to increase funding to schools under Proposition 98's funding formula, Governor Schwarzenegger supported the suspension of Proposition 98. He crafted a deal with the legislature to suspend the allocation of \$2 billion that had been guaranteed to education under Proposition 98. By the time state revenues were updated, the suspension amounted to \$3.6 billion.

This led to a lawsuit over the manner in which funding for 2004-05 was determined. Prior to a court ruling, a settlement agreement was reached that provided \$2.9 billion over 7 years to support the Quality Education Investment Act (QEIA) for the state's lowest performing schools.

In May 2010, the California School Boards Association led a lawsuit against the State of California and then governor Schwarzenegger, arguing that while education is a fundamental right under the State constitution, the State has failed

in its obligation to fund this right. The case is titled **Robles-Wong v. California**. The case has not yet been decided.

In 2010-11, because of a State budget shortfall, Proposition 98 guarantees were again suspended, reducing the constitutionally minimum funding level for K-12 education by \$4.3 billion.

The State's 2011-12 budget was balanced with the hope that an additional \$4 billion in revenues would be received. We now know that the \$4 billion revenue projection was overly optimistic. As a result, CUSD's 2011-12 mid-year budget cut was \$350,000.

## A BRIEF HISTORY OF FEDERAL GOVERNMENT INVOLVEMENT IN PUBLIC EDUCATION (K-12)

Article 1, Section 8 of the US Constitution authorized the Congress to collect taxes to provide for the “general welfare” of the United States. However, for almost 180 years the federal government did very little to promote or support public schools.

In the 1800s the federal government provided various land grants for schools, and occasionally distributed surplus funds to states, which gradually developed public school systems.

In 1896, a Supreme Court decision (**Plessy v. Ferguson**) which focused on the legality of segregated railway cars, ruled that the **14th Amendment** rights of “equal protection” and “due process” were not being violated, as long as facilities were equal. This had significant implications for public schools. The phrase “separate but equal” justified segregated schools for the next 58 years.

During the 1930s, Franklin Roosevelt’s New Deal programs expanded the scope and power of the federal government, but did not have much legal or financial impact on public schools.

In 1954, a landmark Supreme Court decision (**Brown v. Board of Education**) reversed Plessy v. Ferguson. The Court ruled that racially segregated schools were not equal, and that state laws which supported segregated schools were unconstitutional. As a direct consequence of this ruling, federal government policies gradually began to address inequities of opportunity in public education.

In the 1960s, during the Johnson Administration, there was major legislation dealing with racial discrimination, as well as funding of public schools. Federal money started to flow out to states and local districts, but with strings attached, particularly regarding equal opportunity. This was the beginning of **ESEA**, the Elementary and Secondary Education Act, and the beginning of half a century of significant federal funding for states and local school districts, always with strings attached.

At the start of ESEA, Congress authorized a study on educational equality in the US, which resulted in the Coleman Report. The single most significant conclusion of this massive study was that student background and socio-economic status are the most important variables in determining educational outcomes.

Key features of the initial ESEA, in 1965, included Title I, which funded programs for economically disadvantaged students, and Title VI, which outlawed federal funding of segregated programs, and began to provide funding for students who were initially termed “handicapped.” ESEA funds were eventually allocated to support local school programs in various areas of need, including professional development, instructional resources, social and cultural enrichment, parental involvement, library improvement, and nutritional, medical, and social services. The Head Start Program was one of the first programs authorized by ESEA. Over time, other Early Childhood Education programs followed, as studies found that early intervention was effective

In 1972, Title IX prohibited discrimination based on gender. Title IX has affected many school’s athletic programs over the years.

In 1975, **PL94-142**, termed “**The Education of All Handicapped Children Act**” required that a free, appropriate education, suited to each student’s individual needs and offered in the “least restrictive environment” be provided to all “handicapped” children. In 1990 this was amended and renamed “The Individual with Disabilities Education Act,” or **IDEA**.

ESEA and IDEA encompass what is generally called Special Education. There are now 13 specified categories of disabilities. Funding has always been a major problem. The federal government has never provided adequate funding for Special Ed programs, and states and school districts have had to accommodate “Special Ed encroachment” on their general fund budgets every year.

ESEA has not provided significant general fund aid to public schools. Instead, it has provided “categorical” support - aid targeted to a specific student population, such as low income students, or students with special needs. In 2011 ESEA, reformulated as **No Child Left Behind**, allocated \$14.6 billion in Title I funds and \$11.5 billion in Title VI (or IDEA) funds. \$1,831,515 of the \$26.1 billion came to Claremont Unified School District.

From the first days of the federal government’s financial involvement in public schools, one of the fundamental premises behind the idea of compensatory education, and of ESEA in general, has been that state and local authorities do not ensure educational opportunities for all of their students, and that they cannot be trusted to do so without federal intervention.

Since the 1990s, most legal actions have focused on adequacy rather than equity as a way of ensuring that all students get a basic education. This has resulted in closer scrutiny of the details of programs provided by states and districts, and their costs.

A 1991 study by Ferguson found that students' learning would be most profoundly affected by funding directed toward teacher quality as measured by assessments of skills and knowledge. Since then, for better or worse, attention has been focused on teachers.

## 21st Century Developments

In 2001 "No Child Left Behind" (**NCLB**) reauthorized ESEA with the goals of continual academic improvement, reducing the achievement gaps of various student subgroups, and holding states and schools accountable for student achievement, as measured by standardized test scores. So, under NCLB, federal money has new strings attached. School districts are now required to show annual yearly progress, on a per school and per subgroup basis, or face sanctions. This has dramatically increased and changed the federal government's role in public education.

How is it working? Test scores have generally increased, but scores have not increased enough to meet the requirements of NCLB. More schools are considered to be underperforming, and are now facing the prospect of losing some funding or having outside government officials appointed to "remediate" academic programs. In this atmosphere, educators are facing more challenges than they did before NCLB. Some educators question whether NCLB may be doing students more harm than good.

As of February 2012, states are beginning to obtain waivers from the requirements of NCLB, and it appears that this federal program is beginning to implode. Members of Congress have expressed various opinions, but substantive Congressional action does not seem likely this election year.

In 2009 "Race to the Top" (**RTTT**) was signed into law by President Obama. This new program changes the process by which some federal government money is distributed to states by encouraging competitive grant proposals. The winning applicants receive funding for planning specific educational reforms approved by the federal government.

One prominent and controversial example of RTTT goals is "to improve teacher and principal effectiveness based on performance" by means of incentives, such as merit pay. Some research has indicated that merit pay is not effectively administered, and valid assessments of performance have yet to be developed.

These recent attempts to reform public education, developed by both political parties, convey two negative messages to teachers: that teachers generally do not know what they're doing, and that they aren't trying hard enough. Teachers have criticized these messages as largely misplaced.

It should be noted that over the past 45 years, federal involvement in public education has ranged from noble and compelling goals, such as overcoming racial discrimination, poverty, and learning disabilities, to what some view as the current focus to micromanage schools and evaluate teachers. School districts are in a difficult bind. They desperately need the funding, but the federal strings attached have become increasingly burdensome in recent years.

The federal government provided schools necessary assistance after the economic collapse of 2008-2009 by approving temporary funding that enabled school districts to avoid the worst-case scenarios of massive layoffs, class size increases, and severe budget imbalances. CUSD received an infusion of \$3,628,261 in 2009-10, \$2,266,265 in 2010-11 and to date in 2011-12, \$34,860 and kept the damage to a minimum. These funds were used to retain 18 teachers, 5.8 counselors, 2 Principals, 4 Assistant Principals, 1 Athletic Director, Special Education staff including the Principal, a teacher, a coordinator, a Transition Specialist, Psychologists and a Program Specialist at Danbury School, 5.375 Library Media Assistants and several other support staff. Funds were also used for a new, district-wide phone system and technology upgrades. However, "bailout" is temporary, and problems remain.

## MYTHS AND FACTS

**MYTH #1—School districts regularly cry “wolf” regarding funding. In fact there have not been significant reductions in school funding in recent years.**

### **FACTS:**

Recent fiscal implications for the Claremont Unified School District (CUSD) of actions in Sacramento and in Washington D.C. include:

- A reduction in operating revenue for the CUSD from \$58.3 million for the 2007-2008 fiscal year to a budgeted figure of \$55.5 million for the 2011-2012 fiscal year.
- A reduction in funding of \$8.7 million for the 2011-2012 fiscal year from the amount which CUSD is entitled to receive for general purposes under the State’s revenue limit calculation. This represents the difference between the \$5,205 per student in funding allocated to CUSD for the current fiscal year and the revenue limit of \$6,487 per pupil required by Proposition 98 to be paid to the CUSD.
- The national average for funding was \$10,297 per student in 2007-08 (the latest EdSource information available. See Appendix A). During the 2007-08 fiscal year California schools were funded at an average of \$9,706 per student, or 28<sup>th</sup> nationally. Adjusted for the average salaries in each state, California’s per-pupil expenditure is revised to \$8,853 and its ranking for expenditure per student falls to 43rd for the 2007-08 fiscal year (Appendix B). While we know CUSD’s per pupil funding is now \$5,205, we do not have updated EdSource national rankings.
- CUSD has reduced staff and other costs since the 2007-2008 school year. A summary of some of these reductions is listed in Appendix C attached. Funds from the American Recovery and Reinvestment Act were used in 2009-10 and 2010-11 to reduce the impacts of the revenue reductions from the State of California.
- Over the past two academic years CUSD has used federal funding from both the American Recovery and Reinvestment Act of 2009 and the American Jobs Act to reduce the impact of the reductions in revenue from the State of California. The last of these federal monies was expended by the CUSD to support educational programming during the 2010-2011 fiscal year.

- CUSD has transferred \$1.5 million from its Deferred Maintenance and Adult Education funds to the CUSD General Fund. In addition, CUSD has reprioritized selected restricted funding received by the District. Both of these steps have been permitted by recent California legislation allowing greater flexibility in school expenditures for a limited period of time.
- A mid-year reduction during the 2011-2012 fiscal year of approximately \$350,000 will be experienced by CUSD as a result of the automatic budget reduction measures put in place to address the revenue shortfall for the current fiscal year being experienced by the State of California.
- Based upon the California State budget proposed by the Governor in January 2012 for the 2012-2013 fiscal year, CUSD would receive a reduction of \$2.5 million to the General Fund for the next fiscal year if the Governor's proposed tax measure does not pass in November 2012.

**MYTH #2—My child's absence from school does not impact the funds received by the Claremont Unified School District; certainly not if my child's absence is excused.**

**FACTS:**

***No funding is received by the CUSD for excused absences.*** This is a change in the funding law enacted in the 1990's. Absence verification by schools addresses the requirements of the California's compulsory education law, not school funding. The reason for a student's absence is meaningless as it relates to CUSD's revenue limit; an absence for any reason means no funding. However, a completed independent study contract with a student for an absence of 5 or more consecutive days counts for average daily attendance and thus adds State funding for CUSD programs.

About 70% of the revenue school districts receive in California is for general purposes with the remaining 30% coming from categorical programs. Much of the general purpose funding a district receives per student is called the "revenue limit." The general purpose funds that California school districts receive is based primarily upon a revenue limit calculation that depends on the average number of pupils attending school in the district over the year. A district's average daily attendance (ADA) multiplied by the district's per-pupil revenue limit equals the district's total revenue limit income, which is also the bulk of the funds available for general purposes.

Claremont Unified School District's (CUSD) revenue limit for the 2011-2012 school year is \$5,205.00 per pupil. CUSD's average daily attendance is



historically equal to approximately 96% of the students enrolled in the district. This ADA figure translates to general purpose funding based upon ADA for CUSD for the 2011-2012 school year of \$36.5 million. A 1% increase in the CUSD average daily attendance would provide the district with approximately \$350,000.00 in additional revenue annually.

**MYTH #3—Inter-district Transfer Students cost the school district money that could be spent on Claremont students. Our tax dollars subsidize Inter-district transfer students.**

**FACTS:**

What is an inter-district transfer student (IDT)? These are students who reside outside of the boundaries of the Claremont Unified School District who attend Claremont schools. The boundaries of the Claremont School District are not the same as those for the City of Claremont. Some students residing in the cities of Pomona and La Verne live within the attendance boundaries of the Claremont School District and are Claremont USD students and *not* IDTs from day one (Appendix D). If a family living outside of the Claremont district wants their child to attend school in Claremont, both their home district and Claremont must approve the transfer. The school board sets policies for the district staff to follow before a transfer request can be approved. For example, a school that is at capacity cannot accept incoming IDT students and an IDT student who violates standards for behavior and attendance can be sent back to their home district without an expulsion hearing. An IDT student can be moved to a different school in mid-year if a new CUSD resident causes the school (or grade level) to exceed its capacity.

Why does the district accept IDT students in the first place? There are several reasons. First and foremost, having IDT students allows CUSD to avoid closing schools. If elementary age K-6 IDTs were eliminated, the district would surely be forced to close at least one elementary school and possibly two. There are 455 elementary age IDTs attending Claremont schools. That's about the size of either Mountain View alone or Oakmont and Vista combined.

Similarly, there are economies for lower elementary grade levels (K-3) that have class sizes set at a fixed level (approximately 24-25 students per teacher). Since students don't come to school in fixed bundles of 24 per grade level, the district can receive the full amount of money for a classroom of 24 students where only 17 might be CUSD residents. Finally, IDT students bring in additional revenue from the state. At \$5205 per student (the Revenue Limit) the certain loss of funding at El Roble if IDTs were eliminated would amount to \$983,000 and at Claremont High it would be about \$2.4 million. That's on top of any other cutbacks the state might impose due to the ongoing poor economy. At Claremont High School, the IDTs add to the student body population which

allows greater course offerings and co-curricular and extra-curricular opportunities.

Do the taxes paid by Claremont residents subsidize IDT students? No. In fact there is no relationship between the amount of sales, income and property tax money Claremont sends to Sacramento and the amount the state sends back to operate the schools. Since the money used to operate the schools (i.e., the Revenue Limit) comes from the state, tax payments by local residents do not subsidize IDTs when it comes to the general fund operating budget. If all 1250 IDTs were eliminated, the sales, income and property taxes that Claremont residents pay would stay exactly the same.

If taxes stay the same and the IDTs are gone, wouldn't there be more for the remaining Claremont students? No. The state funds public schools based on their average daily student attendance. If the attendance drops, so does the amount of money coming in from the state to operate the schools. Teachers, principals and other staff would have to be eliminated to make up for the loss of funds. In fact, the teachers who make the least amount of money would be eliminated first. This would mean that teachers from around the district could potentially lose their jobs, not just the teachers at whichever school(s) the district would be forced to close. By definition, the remaining staff would have greater seniority and thus be relatively higher paid. With a smaller student population left to cover a more expensive staff, the district would probably have to cut other services or increase class sizes to cover the difference.

Why would teachers need to be eliminated? Wouldn't retirements cover the number of teaching positions we might lose? Probably not. That is because teachers need to have the right credential to be qualified for the subject or grade level they teach. Unless a teacher has more than one credential (very unlikely) a high school history teacher could not teach science and an elementary school teacher would not be qualified to teach at El Roble or the High School, for example.

What about "voted indebtedness" like the bond funds from Measure Y and the Recreation Assessment District? Aren't these fees that are listed on the property tax bill being used to subsidize IDT students? It's true that the parents of the IDT student do not pay these same fees that Claremont School District residents pay but they do pay similar charges in their home districts. However, the money is not spent on students; it's spent on buildings, playgrounds and equipment. If the building or playground is going to stay open anyway, then there is no savings, either to the district or to the tax payer by eliminating IDT students. The only way to realize a savings for a future bond initiative is to close a school.

One might argue that some portable classrooms could be eliminated. It is not possible to state factually what might happen. It would depend on which elementary school(s) the district closed, how many Claremont School District

resident students attended those schools and where these students were moved. Portables that IDT students vacated could be filled up again by resident students moving in from a school that had been closed.

**MYTH #4: Claremont is unique in the school bonds and assessments that taxpayers are responsible for. Parents of IDT students avoid having to pay these assessments.**

**FACTS:**

While it's true that IDT parents do not pay the Measure Y and Recreation Assessment District fees levied within CUSD, in nearly every case they are paying similar charges from their home districts. Most districts surrounding Claremont in both Los Angeles and San Bernardino Counties also have passed multiple general obligation bonds for school improvement (See Appendix E). These districts include:

LA County

- Bonita Unified (La Verne, San Dimas)
- Charter Oak Unified ((Covina, Glendora)
- Pomona Unified
- Rowland Unified (Industry, La Puente, Rowland Heights, Walnut, West Covina)
- Walnut Valley Unified (Diamond Bar and Walnut)

San Bernardino County

- Chaffey High School District (Ontario, Montclair, Upland, Chino, Mount Baldy, Rancho Cucamonga)
- Mount Baldy Elementary
- Ontario-Montclair Elementary District
- Upland Unified

According to Ed Source, 79% of 698 General Obligation (GO) bond elections have passed since 2001. Even after the economic collapse of 2008, local communities have passed GO bond initiatives at a rate of 75%. Fifty seven districts held GO bond elections between July and December 2010 and voters in 75% of these districts approved passage of the bonds. Appendix E of this report lists California K-12 bond elections that were successful in 2010. Many of these districts were similar in size or smaller than Claremont. (See Appendix G for CUSD student population by school). For example, the Centinela Valley Union HS District, with an enrollment of 6500 students, passed a \$98 million dollar GO bond initiative in 2010. Duarte Unified, at nearly 4100 students passed a \$62 million dollar initiative.

Likewise, other Los Angeles County school districts that are similar to Claremont have approved Assessment Districts or Parcel Taxes, similar to Claremont's Recreation Assessment District. These districts include: Bonita Unified (Parcel Tax), La Canada, Las Virgenes, Palos Verdes, San Marino, Santa Monica, and South Pasadena.

**MYTH #5---Money from the California Lottery is a significant source of revenue for public education.**

**FACTS:**

In 1984, California voters approved **Proposition 37** which established the California Lottery and stated, in part, that Lottery revenues "shall not be used as substitute funds but rather shall supplement the total amount of money allocated for public education."

As early as 1988, with the amount of State funding of education declining, lottery revenues were used to make up the difference. Rather than "supplementing" funding for education, Lottery revenues began and continue to "supplant" state funds directed to education. In 1988, 3.5% of public education funding from the State came from Lottery revenues. Today, 1.5% of public education funding from the State comes from Lottery revenues. Compare this to New York, where 34% of state funding of education comes from Lottery revenues and Connecticut where 30% of education funding comes from Lottery revenues.

It should also be noted that California Lottery money is a revenue source not only for K-12 public education, but also for the University of California and California State University systems, Adult Education, Charter Schools and schools in the Department of Juvenile Justice System.

Statewide, about 63% of total receipts from the Lottery go to funding teachers' pay and benefits. 20% goes to the classroom and the remaining 17% is used in other areas.

In 2000, California voters approved **Proposition 20** which required that 50% of the growth in Lottery revenues over the base year of 1997-98 be allocated for instructional materials in the K-14 system.

Today, \$15.97 of the \$5205 per pupil ADA comes from Lottery funds. Under Proposition 20, an additional \$17.01 of the \$5205 ADA is dedicated to instructional materials. In other words, a total of \$32.98 of the \$5205 per pupil ADA statewide comes from Lottery funds or 0.6%.

**MYTH #6—Money from parent and community donations is a significant source of revenue for the Claremont Unified School District.**

**1) Parent and Community donations to schools in this district are sufficient to compensate for losses of state revenues for the schools.**

**2) CUSD students share fairly in the donations from community sources.**

**FACTS:**

Claremont parents and residents *are* generous in contributing to the local schools. In 2010-2011 they contributed over **\$1.35 million, or \$190 per student**, to the district's schools.

Please see Appendix F for charts detailing contributions from local sources to each school and total amounts contributed in the last school year. Appendix G shows CUSD enrollment by school and the amount per student contributed from parent and community sources at each school.

1) However, because state budget reductions have been so severe, local gifts do not compensate for the revenues CUSD has lost.

- In the current fiscal year, because of the state budget shortfall, revenues for CUSD have been reduced by **\$8.7 million** from the amount the district is legally entitled to receive according to the state's revenue-limit calculation. Local contributions of \$1.35 million are about 1/6 of that amount.
- The district's budget has been reduced by **\$2.8 million** over four years—from \$58.3 million in 2007-2008 to **\$55.5 million** in 2010-2011. \$1.35 million is less than half of that amount.
- \$1.35 million is just over **2%** of the district's 2010-2011 budget.
- The current district per-student funding (ADA) from the state is \$5205. Community donations, averaging \$190 per student, are about **3.5%** of that amount.

Much of this funding, especially at the secondary schools, is targeted to extracurricular activities. At the elementary schools, the music and arts programs that are normally funded as part of the regular school curriculum have been severely reduced. They are being funded wholly or in part by parent and community donations, along with field trips, assemblies and instructional supplies.

2) The charts in the appendices show a wide discrepancy in per-student allocation of funds to Claremont’s elementary-school students from parent and community donations.

Sycamore	\$188.02 per student
Condit	\$142.74
Oakmont	\$133.55
Chaparral	\$123.57
Sumner/Danbury	\$80.07
Vista del Valle	\$68.43
Mountain View	\$64.89

The average per-pupil elementary-school donation in 2010-2011 was **\$114.47**.

Historically figures on local contributions to the schools have been very difficult, if not impossible, to obtain. We would like to thank our main sources in CUSD—the principals, whom we contacted with the assistance of Liz Jefferson in the superintendent’s office, Superintendent Gloria Johnston, and PFA leaders. We recognize that these figures may be imprecise, but this is a first stab, which we hope will be followed up with a consistent, long-term effort by district administrators to provide greater transparency to staff, parents, community members, and contributing organizations.

## **MYTH #7---Local School Districts control the amount of funds spent on Special Education.**

### **FACTS:**

**Education for All Handicapped Children** was signed into law in 1975. (Reauthorized as Individuals with Disabilities Education Act [**IDEA**] in 1990 and periodically reauthorized since. States receiving Federal Funds are required to ensure that every child with special needs receives a free and appropriate public school education in a least restrictive environment, based on an Individualized Education Program (**IEP**) with parent participation in decision making and the right of due process if the parent disagrees with the plan. These rights may include such things as reimbursement for education in a private school or attorney fees when a child cannot receive an appropriate education in the public school.

**The California Master Plan for Special Education (MPSE) 1981** is consistent with IDEA and ensures that all California children with exceptional needs from infancy to age 22 receive a free and appropriate public education. Under this law, districts must locate and evaluate all disabled children and educate them in regular classes when suitable or in the “least restrictive environment.” Parents are included in developing an IEP that describes the types of Special Education services for the student.

**The California Early Intervention Services Act of 1993**, passed in response to federal requirements (approved in 1998 and placed in Title 17), was created to provide early intervention services to infants with a disability, or at risk of a disability, from birth through 2 years of age, to provide an appropriate start on their educational path. Funding for these services comes from the federal government under the Individuals with Disabilities Act.

**The Special Education Reform Act AB 602** in 1997 changed the state’s funding structure for Special Education from one based on pupil calculation to a population-based method. The funds are allocated based on an estimate of the total student population in a Special Education Local Plan Area (SELPA) rather than on the number of identified SE students. The individual SELPAS are then responsible for allocating funds for the services provided by the districts for the individual students and SE funds are to be used solely for Special Education services. The purpose of SELPA is to ensure that all pupils with disabilities living within its boundaries will be provided a free and appropriate public education as required by IDEA and the California Education Code. The Claremont Unified School District is a member of the East San Gabriel Valley SELPA which is made up of approximately 14 school districts (Local Education Agencies or **LEA**), agencies and the LA County Office of Education as the responsible local agent for the SELPA.

The mandates described above in the laws and regulations must be adhered to by the local school district.

In 1993, federal and state funds covered the costs of CUSD's Special Education programs. Today, however, state and federal funding provided to the SELPA does not cover the full cost of educating students with disabilities. Local school districts are required to provide their share. California State Special Education funding has remained non-discretionary even as some other categorical fund have been reduced and made discretionary. This means districts *must* come up with the full difference between the state and federal funds and the actual cost of services. The current annual cost to CUSD is \$500,000 to \$1,000,000 from the General Fund to make up the difference.

Disabilities that qualify a student for SE services vary widely, from a mild speech disability to an orthopedic condition that requires specialized individual care that goes well beyond classroom instruction. These costs are determined in the IEP process and include a parent's right to appeal the IEP decisions. The costs of educating the 25% of the students with the most serious disabilities can be very high, including taxi fare, private school tuition, special programs and even the assignment of an individual resource specialist to one child full time in the classroom. Sometimes special programs are available only out of state and costs include housing and visits home. Costs can add up to \$70,000 to \$80,000 per year in some cases and there is no way for a school district to predict these costs from year to year.

**MYTH #8---Resources are allocated by the District to each school according to size of school and these resources provide sufficient funding for classroom supplies so that teachers have no need to dip into their own pockets for them.**

**FACTS:**

In a 2009 district-wide poll, teachers were asked how much money they spent out of their own pockets. The average amount was \$1030 per academic year.

School Site "Resource Allocations" are based on enrollment and used for site purposes. There are 4 components:

- |                        |                    |
|------------------------|--------------------|
| Shared decision making | Custodial supplies |
| Site technology        | Administration     |

These funds go to the sites rather than to classrooms. There is no budget for individual classrooms. Many school PFA's allocate a set amount for teacher discretionary use. The amount of supplies for classrooms is down by about half. It is possible to get such items as construction paper and pencils from supplies,



but items such as clay are no longer provided as school sites allocate resources for “bare necessities.”

Several budget items that supported classrooms have been transferred to other uses or eliminated from the budget including desk/chair allocations, capital purchases for technology and office and library staff at CHS. Costs for copying materials and documents have been transferred from the District to individual schools.

**MYTH #9---Teachers are overpaid.**

**FACTS:**

Teacher salaries in Claremont currently range from \$45,000 to \$90,000. The average teacher salary in 2010 was \$67,494 (down from \$67,923 in 2008 but a 1.2% increase over the \$66,700 average in 2009). The average teacher salary in California in 2010 was \$67,932, an increase of 1.4% from 2009. The increases that Claremont teachers have received are in line with the increases in the State and Claremont teachers’ salaries are lower than the state-wide average.

Average CUSD Certificated Teacher Salaries in 2011 as compared to surrounding unified school districts:

Claremont	\$68,397
Bonita	70,812
Pomona	71,140
Upland	73,757
Glendora	74,056

Relative to school districts competing for teachers, Claremont USD teachers are not overpaid. However, it is difficult to compare teacher salaries from district to district because of the differences in out-of-pocket contributions that teachers make.

In CUSD, a reason that the salary average is not lower at this point is that there have been very few new teachers hired in recent years. New teachers’ salaries would be in the lower range. Many current experienced teachers have been here for a long time. The average years of teaching for Claremont teachers is 14.4 years.

In 1986 the amount contributed to benefits by the district per year was \$5500 per employee. The 2011-12 amount is \$6050, an increase of \$550. Currently, teachers pay the entire employee share of contributions to the State Teachers’ Retirement System (STRS).

Health Insurance costs to teachers over time:

Up until September 2003, health insurance costs were fully paid by the District (Basic Kaiser or HealthNet). More recently teachers are paying, through payroll deduction, into their health insurance in the following amounts:

	<u>Single Coverage per month</u>	<u>Include Spouse per month</u>	<u>Include Family per month</u>
2003-2009			
Teacher paid:	\$ 10	\$ 20	\$ 30
2009-present			
Teacher pays:	\$180	\$270	\$395

Also, co-pays are much higher now.

Teachers and staff have not received a cost of living adjustment since 2007-08. Many employees have reached maximum step and column levels and therefore are receiving the same salary they did 5 years ago while the costs for health insurance have increased dramatically.

These facts mean that the take-home pay for teachers has been declining in recent years.

### **MYTH #10---Teachers work fewer hours than other professionals.**

#### **FACTS:**

While the salaries of other professionals are based on a 12-month payment cycle, teachers are paid for 9.5 months a year. One indication of teachers at work is the presence of teachers' cars at elementary sites on the week ends. A poll taken in 2009 indicated that across the district teachers spend an average of 5 days working in their classrooms in the days before school starts each year.

Examples of teacher responsibilities that are carried out outside of the classroom hours, depending on the grade level:

Grading papers	Grades and Progress Reports
Making lesson plans	(minimum 6 times a year)
Finding or creating materials	All-School activities
Giving children extra help	(w. parents and students)
(before school, lunch, after School)	Sports, Theatre programs
Special Education meetings	Taking professional courses
(w. children, teachers, parents)	(often at teacher cost)
Assigned committees	Creating bulletin boards

Recess duty  
Bus duty

Filing documents, materials  
Dusting, cleaning boards &  
counters

The amount of paper work teachers are required to complete to comply with state and federal classroom mandates and testing has increased dramatically. The estimate is that a teacher spends 20 to 30 hours yearly on testing alone.

Increased class sizes have added to the teacher workload with authorized class sizes averaging:

	<u>K-3</u>	<u>4-6</u>	<u>7-12</u>	<u>HS English &amp; Algebra*</u>
2008:	20 to 1	34 to 1	37 to 1	20 to 1
Now:	24.94 to 1	34 to 1	38 to 1	38 to 1

\* 9<sup>th</sup> grade English and Introduction to Algebra

Finally, the job of teaching becomes more psychologically difficult as the district is legally forced to issue pink slips (notice of not rehiring) in March. Because of budget uncertainties, in 2010 pink slips had to be issued to one third of the teachers in the district—105 of the 310 teachers. It was clear that the district could not function without them, but it was obligated by law to give them notice. The resulting stress on the targeted teachers and their families was intense.

**MYTH #11—CUSD has adequate funds for maintaining and upgrading its facilities.**

**FACTS:**

Deferred Maintenance: \$1.5 million is being transferred from the district's Deferred Maintenance budget and from the Claremont Adult School to the district's General Funds. This transfer means that routine maintenance/repair to roofs and playgrounds will continue to be deferred, as will painting, general repairs etc. This will result in a general deterioration of school facilities. While deferred maintenance is an immediate reaction to the current budget crisis, it will be more expensive in the long run to restore facilities and grounds.

**MYTH #12—The Claremont Adult School has adequate support to fulfill its mission.**

**FACTS:**

The Adult School has been devastated by the transfer of funds to the District's General Fund. The *ABC's for Me* Preschool, which was partly subsidized, has been turned over to a private company at higher cost to parents. This means that some children will have less preparation for Kindergarten, making teaching more difficult.

Many other valuable classes were cancelled, some were changed to fee-based programs and some, like Shakespeare classes, are meeting privately.

## **LEAGUE OF WOMEN VOTERS POSITIONS ON PUBLIC EDUCATION**

The League of Women Voters takes on studies for the purpose of informing itself and the public about public policy and to form or review its positions regarding issues. The League does this so that as the need arises, it can take positions to support or oppose legislation or actions, based on a sound foundation of knowledge and understanding of the issues. League only takes positions on public policy where it has studied the issue, reached consensus and formed a position.

The League of Women Voters has had a continuing concern in public education for many years. In 1999-2000 our local League did a study of local school districts, relating to the state laws. In 2003-05 the local League participated in a LWV State Study on Equitable Access to Quality Education. Last year, the local League participated in a national study on the Role of the Federal Government in Education.

This current local study is designed to inform ourselves and our local community about the financial situation in the Claremont Unified School District as it struggles to meet its obligations in a very tight financial climate within the myriad of complex rules and regulations imposed by both the State and Federal government.

Over the years, League has taken positions on Education Finance at the National, State, and Local levels. This current study on Local Education Finance relates to positions on Education Finance at all levels as well. Positions cited here only relate to education finance. There are many positions relating to other areas of education, especially at the California League State level.

### **League of Women Voters of the United States**

"The League of Women Voters of the United States believes that the federal government shares with other levels of government the responsibility to provide equality of opportunity for education, employment and housing for all persons in the United States, regardless of the race, color, gender, religion, national origin, age, sexual orientation or disability. ..." (LWV US Impact on Issues 2010-12, p. 61)

In its Guidelines and Criteria, LWV US states: (Reference above, p. 61-2)

League supports include:

- federal financial aid to help needy students remain in high school and to take advantage of post-high school training and education.
- withholding federal funds from school districts that fail to meet realistic and effective guidelines and standards for school integration.

Although LWVUS has Education Positions relating to several areas of education, it has a limited position on Education Financing, stating in explanation for that:

"Many state and local Leagues have identified inequities in education financing during the course of their own program studies and have worked for reforms. Action on school financing takes place predominantly at the state level, where school financing laws are made.....a number of state Leagues (have) stepped up efforts to educate citizens about

inequities and inadequacies of state funding systems." *LWV of the US: Impact on Issues, 2008-10, pp. 62-3.*

### **League of Women Voters of California (LWVC)**

Support a system of public education that is adequate, flexible, equitable, reliable and sustainable, derived from a combination of revenue sources; and distributed fairly to support access and equitable opportunities for all students. *LWVC, Action Policies and Positions, 2009, p. 16*

- Finance: State Level: Responsibility at the state level for: (in part)
- a. primary funding of public education, with provision for as much local control as possible over local schools;
  - b. providing sustainable, adequate, flexible, and timely funding derived from a combination of tax sources to ensure all students have the opportunity to achieve state standards;
  - c. developing a school finance system that incorporates a multi-year mechanism and enables orderly, timely, effective budgeting and negotiating processes at the local level. *p. 17*

- Finance: District Level: Responsibility at the district level for: (in part)
- a. seeking input on educational priorities from all stake-holders, including, but not limited to, school site councils, school board members, principals, teachers, parents, and community organizations.
  - b. utilizing availability of funds to meet local priorities. *p. 17*

### **League of Women Voters of the Claremont Area**

Support of sound fiscal and administrative policies which provide sufficient funds for operating expense and capital improvement, long range planning, increased communication between administrations, school boards, and school district residents. *Local LWV Directory & Yearbook, 2011-12, p. 38.*

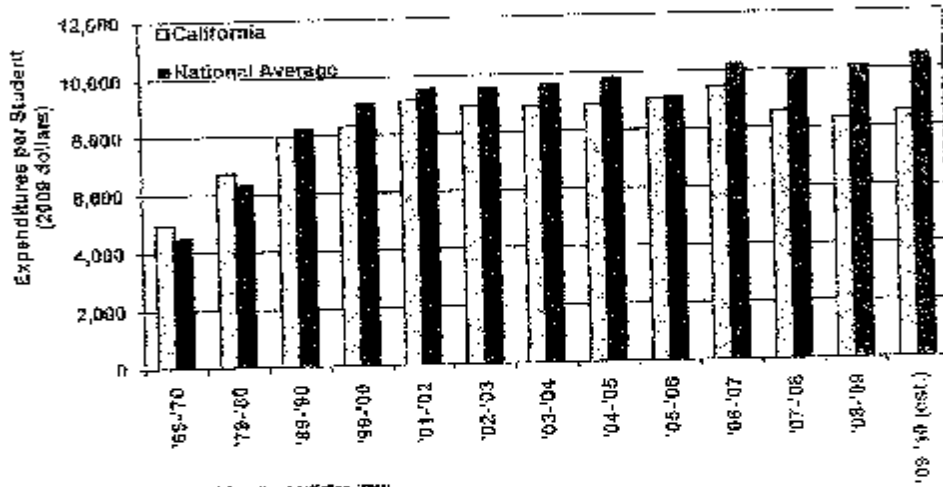
**Next Steps:** Based on these positions at the various League levels, the information gained through this study, and discussion at Unit Meetings, the Education Finance Study Committee may make recommendations regarding the local education finance position to the LWV of the Claremont Area Board of Directors. This may lead to a recommendation from the Board for consideration by the general membership at our Annual Meeting in June 2012.

In view of the continuing increase of the State and Federal roles in education, there could be recommendations to the LWVC regarding its positions at the LWVC Convention in 2013 and recommendations to the LWVUS Convention in 2012 to consider a process to update and improve national positions on education finance.

This local LWV Local Study of Education Finance will be published/posted in a form accessible to the public.

# APPENDIX A

## APPENDIX A



Source: National Center for Education Statistics, 2010

# APPENDIX B

## APPENDIX B

### CURRENT EXPENSE OF EDUCATION PER ADA RANKING OF THE STATES—2009-10

	Current Expense per ADA	
1	District of Columbia	52,076
2	Vermont	20,390
3	Rhode Island	18,226
4	Wyoming	16,332
5	New Jersey	16,229
6	Maine	15,267
7	New York	14,819
8	Montana	14,792
9	Massachusetts	14,594
10	Connecticut	14,312
11	New Hampshire	14,091
12	Arizona	13,763
13	Pennsylvania	13,457
14	Maryland	13,144
15	Hawaii	12,800
16	Virginia	12,644
17	Michigan	12,595
18	Wisconsin	12,364
19	Alaska	12,255
20	Minnesota	12,170
21	Illinois	12,021
22	West Virginia	11,926
23	Oregon	11,793
24	Alabama	11,777
25	Arkansas	11,259
26	Kansas	11,091
	United States	10,852
27	Oahu	10,910
28	Washington	10,626
29	Georgia	10,777
30	Indiana	10,728
31	Colorado	10,498
32	Iowa	10,571
33	New Mexico	10,466
34	South Dakota	10,450
35	Nebraska	10,329
36	Kentucky	10,184
37	South Carolina	10,077
38	Texas	9,857
39	Idaho	9,776
40	Missouri	9,583
41	Florida	9,364
42	North Carolina	9,480
43	North Dakota	9,311
44	Oklahoma	8,992
45	California	8,825
46	Tennessee	8,751
47	Utah	8,664
48	Mississippi	8,643
49	Nevada	8,577
50	Utah	8,542
51	Arizona	8,517

Source: National Education Association, *Rawley & Associates, LLC*



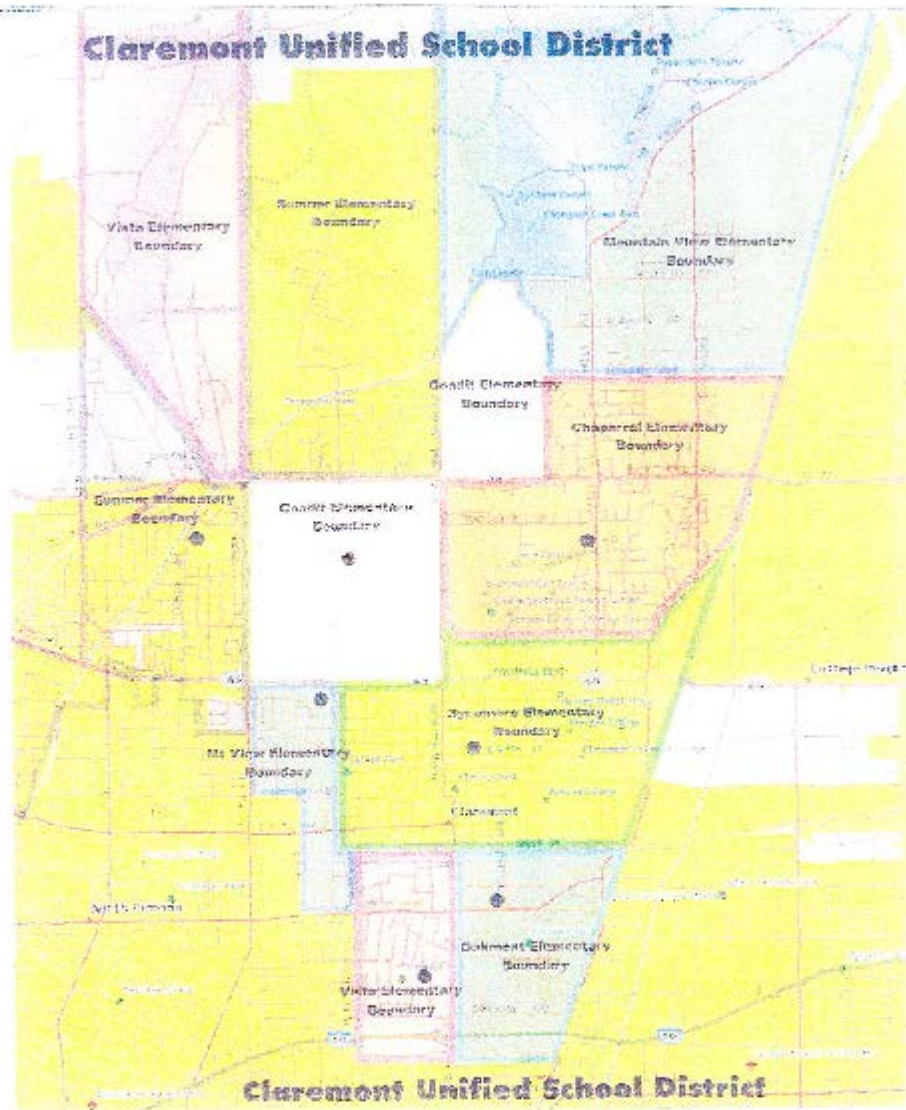
## **APPENDIX C**

### **PARTIAL LIST OF CLAREMONT UNIFIED SCHOOL DISTRICT BUDGET REDUCTIONS SINCE 2007-2008**

Eliminated most classified substitutes  
Eliminated custodial supervisor position  
Eliminated Director of Secondary Education position  
Eliminated Director of Adult Education  
Eliminated Assistant Director, Service Center  
Eliminated Network Analyst  
Eliminated English Language Learner Coordinator  
Eliminated Director of Nutrition Services  
Eliminated 16.9 teacher positions due to increased K-3 class size reduction  
Eliminated English and Math class size reduction at Claremont High School  
Eliminated campus monitors at El Roble Intermediate School  
Re-organized Alternative Education eliminating 2.5 positions  
Re-organized Claremont High School office and library staff eliminating 6.675 positions  
Eliminated transportation funding  
Reorganized accounting/business office eliminating 2.0 positions.  
Re-organized Human Resources Department eliminating 1.0 position  
Re-organized Student Services Department eliminating .75 position  
Re-organized Adult Education department eliminating one position  
RE-organized Educational Services office eliminating 1.75 positions  
Re-organized Service Center, eliminating 1.5 positions  
Reduced health assistant hours district-wide  
Offered early retirement incentive  
Eliminated 1 nursing position  
Froze District contribution to employee health insurance  
Eliminated capital purchases for technology at District level

# APPENDIX D

## APPENDIX D



## APPENDIX E

March 2011



### Successful 2010 K–12 General Obligation (G.O.) Bond and Parcel Tax Measures

*Under current state law, school districts can augment the local funding of their schools in just a few ways. Two commonly used methods requiring voter approval are general obligation bonds, for school facilities, and parcel taxes, usually used for academic programs.*

Voters approved 44% (17) of the 39 parcel taxes put before them in 2010 (based on the best available information). Of those that failed, 13 would have met a 55% threshold. From 1983 through November 2010, voters approved 289 parcel taxes in 543 elections; 179 would have met a 55% threshold.

**To Learn More**

To see any district's election history, go to [www.ed-data.org](http://www.ed-data.org).

G.O. bonds on the ballot fared better. Based on the best available information, in 2010, districts put 77 G.O. bonds on the ballot. Of those, 76 sought 55% approval and 57 (75%) passed. One sought two-thirds approval and passed. Local bond elections generated a total of about \$77 billion from 1986 through 2010, and about \$66 billion (86%) of that was generated from 1998 through 2010.

**Successful General Obligation Bonds in 2010**

FIFTY-FIVE PERCENT VOTE REQUIRED FOR PASSAGE					
District	County	ADA	Bond Amount	Date	Yes Vote
Anaheim City SD	Orange	18,861	\$169,300,000	11/10	63.9%
Anderson Valley Unified	Mendocino	502	\$15,300,000	6/10	65.1%
Arroyo/San Juan Unified	San Benito	1,186	\$9,700,000	11/10	61.01%
Atascadero USD	San Luis Obispo	4,698	\$17,000,000	11/10	65.33%
Belmont Redwood Shores Elementary	San Mateo	2,615	\$25,000,000	11/10	65.9%
Bennett Valley Union Elementary	Sonoma	906	\$10,600,000	11/10	62.9%
Berkeley Unified	Alameda	8,387	\$210,000,000	11/10	77.16%
Big Pine USD	Inyo	175	\$4,100,000	6/10	61.9%
Blue Lake Union Elementary	Umboldt	151	\$3,000,000	6/10	64.3%
Calistoga Joint USD	Napa	799	\$42,000,000	11/10	65.2%
Campbell Union Elementary	Santa Clara	633	\$150,000,000	6/10	73.9%
Carmelita Valley Union High	Los Angeles	6,552	\$98,000,000	11/10	64.87%
Crowsdale Unified	Sonoma	1,404	\$17,000,000	11/10	55.6%
Coalinga-Huron Joint Unified	Fresno	4,023	\$16,100,000	11/10	63.69%
Dehesa Elementary	San Diego	155	\$5,500,000	11/10	58.41%
Fluate Unified	Los Angeles	4,064	\$62,000,000	11/10	59.9%

**32**

El Rancho Unified	Los Angeles	10,526	\$52,000,000	11/10	74.01%
Emery Unified	Alameda	738	\$95,000,000	11/10	73.87%
Encinitas Union Elementary	San Diego	5,297	\$44,700,000	11/10	61.61%
Fairfax Elementary	Kern	2,036	\$24,800,000	11/10	74.06%
Forestville Union Elementary	Sonoma	113	\$5,100,000	11/10	66.1%
Franklin-McKinley Elementary	Santa Clara	9,555	\$50,000,000	11/10	69.91%
Fresno Unified	Fresno	67,995	\$280,000,000	11/10	75.72%
Garden Grove Unified	Orange	46,544	\$250,000,000	6/10	63.8%
Greenfield Union Elementary	Monterey	2,500	\$8,300,000	6/10	59.6%
Hopo Elementary	Santa Barbara	948	\$8,000,000	6/10	69.1%
Jefferson Elementary	San Joaquin	2,357	\$35,400,000	11/10	67.26%
Juban Union High	San Diego	173	\$2,100,000	11/10	60.15%
Los Gatos Union Elementary	Santa Clara	2,742	\$30,900,000	6/10	71.5%
Magnolia Elementary	Orange	6,112	\$16,300,000	11/10	65.7%
Mark West Union Elementary	Sonoma	1,244	\$14,000,000	6/10	59.4%
Martinez Unified	Contra Costa	3,786	\$15,000,000	11/10	65.52%
Monterey Peninsula Unified	Monterey	10,507	\$110,000,000	11/10	71.55%
Moreland Elementary	Santa Clara	3,896	\$55,000,000	11/10	69.15%
Mountain View-Los Altos Union High	Santa Clara	3,505	\$41,300,000	6/10	77.7%
ML Diabln Unified	Contra Costa	32,941	\$348,000,000	6/10	60.9%
Northern Humboldt Union High	Humboldt	1,494	\$25,800,000	11/10	59.47%
Piner-Olivet Union Elementary	Sonoma	1,338	\$20,000,000	11/10	55.4%
Pittsburg Unified	Contra Costa	8,988	\$100,000,000	11/10	68.52%
Rialto Unified	San Bernardino	25,555	\$98,000,000	11/10	69.52%
Robertsville Elementary	Humboldt	652	\$5,000,000	6/10	59.1%
Rosa Valley Elementary	Marin	1,863	\$41,000,000	11/10	71.05%
San Leandro Unified	Alameda	8,362	\$50,100,000	11/10	63.08%
San Marcos Unified	San Diego	16,934	\$227,000,000	11/10	63.39%
San Mateo Union High	San Mateo	8,782	\$186,000,000	11/10	61.9%
Santa Barbara Elementary	Santa Barbara	13,635	\$75,000,000	11/10	70.85%
Santa Barbara High	Santa Barbara	13,635	\$75,000,000	11/10	68.98%
Santa Clara Unified	Santa Clara	13,976	\$81,100,000	11/10	61.44%
Sonoma Valley Unified	Sonoma	4,091	\$40,000,000	11/10	67.6%
Sonoma Elementary	Tuolumne	730	\$7,800,000	11/10	55.16%
South San Francisco Unified	San Mateo	9,000	\$162,000,000	11/10	77.5%
Southern Humboldt Joint Unifed	Humboldt	751	\$25,200,000	6/10	64.2%
St. Helena Unified	Napa	1,262	\$30,000,000	11/10	60.8%
Twin Hills Union Elementary	Sonoma	331	\$11,000,000	11/10	64.8%
West Contra Costa Unified	Contra Costa	77,876	\$380,000,000	6/10	62.6%

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West Sonoma County Union High	Sonoma	2,176	\$23,800,000	11/10	67.4%
Willits Unified	Mendocino	1,625	\$43,800,000	6/10	61.3%
<b>TWO-THIRDS VOTE REQUIRED FOR PASSAGE</b>					
<b>District</b>	<b>County</b>	<b>ADA</b>	<b>Bond Amount</b>	<b>Date</b>	<b>Yes Vote</b>
Wisconsin Elementary	Los Angeles	2,206	\$87,000,000	11/10	75.73%

**Successful Parcel Taxes in 2010**

District	County	ADA	Parcel Tax Rate and Terms	Date	Yes Vote
Acalanes Union HSD	Contra Costa	5,460	\$112/parcel for 5 years	5/10	68.5%
Alare Rock Union Elementary	Santa Clara	12,886	Increase existing tax by \$48/parcel for a total of \$160.16/parcel - 5 years, inflation adjustment.	6/10	74.4%
Berkeley Unified	Alameda	8,587	6.31 cents/sq.ft. residential/9.46 cents/sq.ft. commercial and \$20 on unimproved parcels	11/10	80.9%
Burlingame Elementary	San Mateo	2,465	\$180/parcel for 10 years (renewal)	3/10	71.2%
Cabrillo Unified	San Mateo	3,207	\$150/parcel - 5 years	6/10	71.3%
Fremont Unified	Alameda	30,009	\$33/parcel - 5 years	11/10	70.1%
Fremont Union High	Santa Clara	9,916	Renew existing, expiring parcel tax at the same annual rate of \$98/parcel for 6 years	5/10	72.5%
Lakeside Joint School District	Santa Clara	82	\$311/parcel for 7 years	5/10	67.2%
Menlo Park City Elementary	San Mateo	2,340	\$178/parcel for 7 years, inflation adjustments	5/10	76.2%
Milpitas Unified	Santa Clara	9,386	\$84/parcel - 5 years	6/10	70.8%
Mt. Pleasant Elementary	Santa Clara	2,853	\$95/parcel - 5 years	6/10	71.4%
Oak Grove Elementary	Santa Clara	11,342	Gann Limit Extension for existing \$68/parcel tax for 4 years.	1/10	73.1%
Palo Alto Unified	Santa Clara	11,061	Increase existing parcel tax by \$96/parcel to \$589 for 6 years, with annual 2% increases.	5/10	79.4%
Portola Valley Elementary	San Mateo	709	\$168/parcel for 4 years	5/10	77.6%

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San Francisco Unified	San Francisco	48,226	\$32.20/parcel single family residential and nonresidential, \$16.10/dwelling unit for mixed use and multifamily residential, adjusted for inflation. Renewal of existing parcel tax for a community facilities district, created under Mello-Roos in 1990.	6/10	70%
San Mateo-Foster City	San Mateo	10,008	Increase expiring parcel tax by \$96/parcel for 7 years, total \$180.85/parcel, inflation adjusted.	2/10	67%
Union Elementary	Santa Clara	4,430	\$96/parcel for 6 years	5/10	72.4%

DATA: EdSource

SCHOOL SERVICES OF CALIFORNIA, INC.

LEAGUE OF WOMEN VOTERS OF CALIFORNIA—SMART VOTER

FD-502 (2-74)

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## APPENDIX F

### Parent and Community Donations to CUSD Schools 2010-2011

Elementary Schools	Sources	Annual Amounts	Expenditure Areas
Chaparral	PFA	\$70,000	reading specialist, field trips, technology, Mileage Club, music, Art Masters Program, classroom materials, PE equipment, assemblies, duplicating fund
	CEF	\$10,000	music
	Student Council project	\$200	projection screen
	Best BET	<u>\$2219</u> <b>\$82,419 TOTAL</b>	grants for teachers
Condit	PFA	\$50,000	assemblies, student agendas, supplies, Art Masters Program, library books, school counselor
	CEF	\$10,000	music
	Special family fundraising project	\$29,000	new computers for lab (one-time income)
	Best BET	<u>2498</u> <b>\$91,498 TOTAL</b>	grants to teachers
Mountain View	PFA	\$20,000	field trips, music, art
	CEF	\$10,000	music, art, technology
	Best BET	<u>\$500</u> <b>\$30,500 TOTAL</b>	grants to teachers

Oakmont	PFA and Booster Club  CEF  Best BET	c \$30,000  \$10,000  <u>\$1000</u> <b>\$41,000 TOTAL</b>	K-6 Outdoor Biome field trip (grades 4-6 overnights)  music, Art Masters  grants to teachers
Sumner	PFA  CEF  Class fundraising  Best BET	\$28,300 (\$30,000 average)  \$10,000  c. \$10,000  <u>\$2447</u> <b>\$50,747 TOTAL</b>	field trips, assemblies, classroom materials, reading program awards, Words of Wisdom (character builder), playground equipment  music and art  6th grade Outdoor Science School trip  grants to 8 teachers
Sycamore	PFA  CEF  Best BET  Girl Scouts	\$60,050  \$10,000  \$2000  <u>\$150</u> <b>\$72,200 TOTAL</b>	\$15,000 tech, materials \$2000 assemblies \$2800 field trips \$250 PE equipment \$15,000 intervention teacher, mentors 6th grade Outdoor Science School trip (partial cost) art and music (partial cost)  art and music  grants to teachers  classroom materials



Vista del Valle	PFA	\$9264	field trips, instructional supplies
	CEF	\$10,000	music, Art Masters
	Best BET	<u>\$308</u> <b>\$19,572 TOTAL</b>	grants to teachers
Danbury	PFA	shared with Sumner	playground equipment assemblies teacher allotments field trips
	CEF	\$1500	art, music
	Best BET	<u>\$1000</u> <b>\$2500 TOTAL</b>	grants to teachers

**Upper Schools Sources Annual Amounts Expenditure Areas**

El Roble	PFA	\$26,236	Friday Frolics Teacher Appreciation Lunches Teacher wish lists 8 <sup>th</sup> grade party Graduates' legacy gift
	----- ASB (magazine/cookie dough fundraiser)	----- \$22,000-\$25,000 (\$23,500 average)	----- Student agenda handbooks Renaissance awards Other awards, medals... Field trips Assemblies Friday Frolic Snacks, games, prizes Talent Show prizes Lunchtime activities ASB shirts Red Ribbon Week Costume Contest prizes Bike Marathon ASB advisor substitute pay

<p>El Roble continued</p>	<p>Booster Groups</p> <hr/> <p>CEF</p> <p>Best BET</p>	<p>\$128,062</p> <hr/> <p>\$10,000</p> <p><u>\$1063</u></p> <p><b>\$ 188,861 TOTAL</b></p>	<p>Sports \$4467  Music \$24,918  Pep/Cheer \$21,478  ColorGuard \$9100  Dance/Drill Tm \$9178  Hip-Hop \$15,276  PE Boosters \$43,645</p> <hr/> <p>technology</p> <p>grants to teachers</p>
<p>Claremont High School (CHS)</p>	<p>PFA &amp; Booster Funds</p> <hr/> <p>ASB (Associated Student Body) Sources: ASB card sales Yearbook sales, ads Athletic Admissions-- \$43,437 CIF Profits PE clothing sales Homecoming dance tickets Vending machine sales Student store sales--\$15,000</p> <hr/>	<p>\$483,335</p> <hr/> <p>c.\$250,000 (2009- 10)</p> <hr/>	<p>Band \$31,630  Color Guard \$11,492  Jazz Band \$5,761  Girls Basketball \$15,843  Boys and Girls Cross Country \$50,196  Dance Team \$49,706  Football \$71,061  Boys Golf \$13,718  Cheer \$108,000  Boys Soccer \$9,173  Girls Soccer \$9,617  Girls Softball \$12,183  Speech and Debate \$21,839  Swim/Dive \$9,191  Theatre Boosters \$5,610  Girls Volleyball \$17,973  Boys Water Polo \$6,701  Girls Water Polo \$8,350  Hip Hop Dance Team \$25,291</p> <hr/> <p>Yearbook production costs  PE clothes  Rallies  Lunchtime activities  Staff appreciation  ASB supplies  Webstore transaction fees  Homecoming expenses: city permits, halftime expenses,  dance expenses, personnel  costs, float-building and rally  expenses  Athletic expenses: officials,  supervision, dues, ticket sales,  security, scorekeepers,  announcers...</p> <hr/>

CHS continued	CEF Best BET	\$20,000 <u>\$2089</u> <b>\$755,424 TOTAL</b>	technology for language labs grants to teachers
San Antonio High School	PFA Misc. donations by SAHS Community supporters  CEF Best BET	0 \$8,130  \$10,000 <u>\$1750</u> <b>\$19,880 TOTAL</b>	Class sets of novels, guest speakers, class projects, FEDCO and Target-supported service-learning field trips  Ethernet access for online courses grants to teachers
Community Day School	-----	0	-----

**Abbreviations:**

PFA Parent Faculty Association

Best B.E.T. Business and Education Together

Funded by the Chamber of Commerce and local service organizations (Rotary, Sunrise Rotary, Kiwanis, University Club), with grants up to \$250 to selected teachers for projects and materials for their classrooms

CEF Claremont Educational Foundation

This community non-profit's web site claims that it has raised \$211,500 for the 2011-2012 school year. Monies primarily support art and music programs and technology (documentation cameras, laptop carts...). At CHS a one-time donation is supporting a wireless infrastructure purchase. Amounts vary from year to year: CEF raised \$303,000 for CUSD in 2010-2011.

NOTE: the figures above do not include one-time major capital projects such as the CHS Theatre Renovation.

## APPENDIX G

<u>Enrollments Sept. 2011</u>	<u>Parent and community funds* per school</u>	<u>Parent and community funds* per student</u>
Chaparral	667	\$82,419
Condit	641	\$91,498
Mountain View	470	\$30,500
Oakmont	307	\$41,000
Sumner-Danbury	612+53=665	\$53,247
Sycamore	384	\$72,200
Vista	286	\$19,572
El Roble	1127	\$188,861
Claremont High	2447	\$755,424
San Antonio HS	121	\$19,880
Community Day	18	0
<b>Enrollment Total</b>	<b>7133</b>	<b>Funds Total \$1,354,601</b>
		<b>Funds/student Total \$190</b>

\*Parent and Community Funds:

- PFA
- Class
- Booster
- CEF
- Best B.E.T.
- Miscellaneous

