

OUR MISSION IS UNIQUE AND URGENT.

For four decades the San Marino Schools Foundation has made it possible for our schools to thrive rather than merely survive. Each year, the community's financial commitment, donated through the Foundation, provides a critical element in closing the gap between what state funding provides and what educational excellence requires.

OUR SCHOOLS WIN, OUR STUDENTS WIN.

SAN
MARINO
SCHOOLS
FOUNDATION
Empowering Excellence.

Brochure cover photo from Excellence in Education, 1989

THANK YOU!

WHEN SELECTED TO BE THE STUDENT SCHOOL BOARD MEMBER, Justin Chang '17 made it a goal, during his tenure, to increase the engagement and consequence of his position. Concerned about the increased levels of stress he saw in his fellow students, he asked the board to go beyond mindfulness training to better address students' needs. Chang also took the initiative to interview and survey fellow Titans and then provide data and ideas to the board and district administrators. A year-and-a-half after he made his report to the board, the Wellness Center at the high school opened to positive response and immediate use. Now a pre-med student in his junior year at USC, Justin's concern and passion for the center's mission remain vital. He serves his alma mater as an informal advisor to Director Laura lves.

ENGAGEMENT, INITIATIVE AND CONSEQUENCE are key values for many who lead and serve our schools in a variety of different roles. Similar to Justin's story, this year's annual report features several emerging programs, which the San Marino Schools Foundation proudly supports in partnership with many others in our community. Partnership and collaboration are key traits of our special San Marino experience.

FORTY YEARS AGO, community members and parents recognized how critical the financial need of our schools would be following the passage of Proposition 13. In response, they engaged the problem by creating the Foundation. The positive consequences of their actions have benefited several generations of San Marino students and remain central to the health and well-being of our schools.

TO ALL WHO HAVE CONTRIBUTED to the Foundation this last year, or in the past, we say "Thank you."

an Marino Schools do more with less than any district in California. For almost two decades, our schools have consistently ranked as some of the very best in California. Our graduates continue on to higher education at some of the highest percentages in the nation. San Marino alumni are found at top colleges and universities, and make their way to leadership in all fields: business, science and technology, medicine, law, the arts, and academics.

AND YET, SAN MARINO SCHOOLS rank among the lowest in state and federal funding per pupil. How is it possible that a small school system which receives so little, does so well? This is accomplished by a deep understanding from engaged and educated parents, and from the generosity of supporters and donors.

GREAT SCHOOLS ANCHOR OUR COMMUNITY.

San Marino holds a tradition of educational excellence and valuing its schools. The success of our students and schools is a source of civic pride and has attracted families to San Marino for generations. This is also reflected in the community's strong and stable real estate prices. Parents, community members, and local businesses have stood up and generously supported our students and schools with a willingness to be taxed for their support and with volunteer spirit.

FORTY YEARS AGO, in the wake of Proposition 13, and state legislation cutting school funding, concerned community members established the San Marino Schools Foundation. By focusing philanthropy on supporting local needs, the Foundation continues to provide vital additional financial support to our schools. In 1989, a report on the Foundation's first decade noted, "The District does not qualify for many state and federal education funds because of the high educational and income levels of community residents and the exceptionally high achievement level of its students." The funding impediments and need to compete to be the best, described then, remain today.

BASED ON THIS STRONG HISTORY, the

Foundation is pushing for transparency and innovation in our schools. According to current Foundation President Erin Bilvado, "We cannot rest a moment in this competitive environment." The Foundation is increasing its focus on financial transparency and sustainability, deepening relationships with each school campus, connecting donors' passions and interests to fund critical building blocks of our schools, and securing the legacy of a San Marino experience into the future!

#1

district ranking in 2018 CASPP*

21

number of teachers supported

1197

total donors

70%

donations are made by parents

357

non-parent, community members donate

\$52 million

total SMSF donations over four decades

100%

students benefiting from SMSF support

*California Assessment of Student Performance and Progress

eachers are the center of the Foundation's giving compass. "Teachers first" is the Foundation's starting point.

TEACHERS ARE THE UNSUNG HEROES IN OUR CHILDREN'S LIVES. Their dedication to

the success of San Marino students goes above and beyond the standard and is a part of what sets our district apart from the rest. Our way of saying "thank you" to all of our teachers across all four campuses, as well as to recognize and applaud all their hard work, is to make them the focus of the Foundation's mission.

AS A NOT-FOR-PROFIT ORGANIZATION, the

San Marino Schools Foundation awards grants each year to support key needs on all four of our school campuses. The major grant provided each year funds teacher salaries and benefits, with the goal of improving teacher-to-student ratios.

since its establishment nearly forty years ago, the Foundation has prioritized helping the District keep top teachers in our classrooms. In recent years, the goal has been to allocate the first \$2,000,000 raised each year to support a grant for teachers. This currently supports 21 teachers—1 in 11 of the teachers in our classrooms. These are teaching positions that would be vacant, creating holes in our children's education, if it were not for the combined energies and generosity of all our donors. With the increased cost of healthcare and post-retirement pension expenses for our teachers, the role of the Foundation is critical, and more funding is needed to close our gap.



Supporting TEACHERS' Salaries









First LEGO LEAGUE







ottom line, First LEGO League (FLL) is fun. It's also collaborative STEM learning. Attending the regional competition held at Carver this past year gave parents, family, and fellow students a window into the engagement and enthusiasm this form of experiential learning provides,

as well as a chance to cheer on their favorite team.

A WORLDWIDE STEM PROGRAM with

320,000 members in 98 countries, FLL introduces elementary-age students to the ways that coding, robotic design, teamwork and competition intersect to accomplish engineering tasks. Elementary FLL participation is now beginning its third year in San Marino Schools and offers our students their first opportunity to build and program robots for competition. Utilizing kits developed by LEGO, the students learn how to build and program robots to accomplish a series of defined missions within set time limits.

IN THE 2018-2019 SCHOOL YEAR, the

season ran from August until November. Guided by elementary STEM teachers, Nickie Oh-Saxon and Crystal Wu, each team involved six or seven students who were supported by two or three parent coaches and mentors. Typically, teams meet on Sunday afternoons. Students begin by learning the season's theme, the goals of each mission, then plan solutions, assemble and program the robots to meet the goals, and finally, practice, practice, practice. Additionally, guest speakers like Issa Nesnas, a JPL scientist, parent, and Foundation Trustee, add real-life learning enrichment.

central to fll's appeal to students and its teaching success is its call for gracious professionalism and competition, which it labels, "Coopertition." The core values of the program include: discovery— explore new skills and ideas, innovation— use creativity and persistence to solve problems, impact—apply learning to improve our world, inclusion—we respect each other and embrace our differences, teamwork—we are stronger when we work together, and fun—enjoy and celebrate what we do!

MRS. WU SUMMARIZES IT THIS WAY:

"Teamwork is an idea elementary students are just starting to learn — FLL allows them more opportunity to practice how to be creative and effectively collaborate." Olivia Hsu, of the all-girl Valentine Vipers, sees the positive, "There are no bad ideas — we put our ideas together to find a solution." SMSF is proud to have contributed \$8,415 for the First LEGO League Program, which went directly to fund supplies for the program at both schools. ■









Caltech-STEM PROGRAM



ommunity support for our schools is legendary. It also comes in many different forms. The Honors Caltech-STEM course, inaugurated in the 2018-2019 school year, is one such "only in San Marino" story and an example of how and why we cherish our schools.

SCHOOL BOARD PRESIDENT, and long-time Caltech Associate, Joseph Chang imagined a unique San Marino High School Honors STEM program taught at Caltech that mirrored the learning opportunities provided by the recently established Honors Humanities course at the Huntington Library. Following two years of brainstorming and planning between his contacts and a team from the District, in the fall of 2018, the first group of SMHS students began real-life in lab research led by Caltech professors.

ONE OF CALTECH'S REQUIREMENTS for the program is that the professors leading the program be residents within the San Marino Unified School District boundaries and San Marino Schools parents. These have included Professors Brian Stoltz, Babak Hassibi, Chris Umans, and Julia Greer. Additionally, one of the PhD candidates assisting Dr. Greer and working with the students was 2008 SMHS graduate Anthony Kwong.

IN ADDITION TO ON-CAMPUS instruction by Daniel Lee and Keiko Hiranaka and periodic lecture sessions at Caltech, the program gives students firsthand experience in conducting scientific research in the professors' labs under the direction of their research assistants. Students are exposed to, and work through, the very iterative and sometimes tedious process of conducting basic research where experiments may not work the first time and have to be redesigned. It is a process where patience and dedication are essential to success. As one of the world's leading research institutions, Caltech's labs also have a range of state-of-the-art equipment, like Scanning Electron Microscopes, which gives the students a rare working opportunity few high school students ever experience.

ANTHONY KWONG, INSPIRED TO PURSUE

science by his AP Physics teacher Scott Cameron, describes the benefits of the program: "I believe the students who go through this program will have a head start on understanding scientific research and what kind of career path they want to pursue." This STEM course is a great example of the partnerships that SMUSD establishes within the community. SMSF was proud to contribute \$7,000 for the Caltech STEM Course, which went directly to funding travel for students who participated in this course during the 2018-2019 year.







Focus on Our Students' WELLNESS





is no surprise that attending school in San Marino can be challenging for students. Parents and children alike share high expectations.

FAMILIES MOVE TO SAN MARINO so their children will receive the best in public school education while surrounded by similarly motivated parents and students. In addition to academic stressors, students may feel pressure to live up to the high expectation this opportunity provides. One such indication, in a recent survey of over 1,000 SMHS students, was that 65 percent noted that worries about college and their future were a major source of stress. Stress is a key factor in both physical and mental health.

RESPONDING TO COMMUNITY CONCERNS, and to the national rates of teen depression and suicide, the SMUSD began focusing on student mental health and wellness in 2014. During the following school year, a Mental Health Academy began, which trained teachers, staff and administrators on the signs of major stress and how to be responsive to students when recognized. A mindfulness training program was also implemented and offered to students.

IN 2017, Student School Board Member Justin Chang advised the Board that while the mindfulness exercises were helpful, he had seen stress levels among students continue to rise. He asked the Board to take additional steps to address this need, and they responded by creating a Student Wellness Committee made up of students, parents, Board members and District employees. As a result of this group's study and recommendation, the Titan Wellness Center opened upstairs in the SMHS Library in 2018.

THE CENTER SEEKS to provide a safe, calm space which promotes mental health awareness and supports emotional management. During its inaugural year, it provided campus-wide training sessions, presented guest speakers, hosted peer listening sessions, offered yoga classes and held "fun day" activities. 156 students visited specifically seeking guidance and support, while over 400 participated in a variety of the center's activities. This past fall, student visits and requests for support were putting the center on track to meet increasing demand.

ACCORDING TO the immediate past School Board President, Lisa Link, who is a supporter of the center, "While having a student wellness center will not fully eliminate the stressors that students feel, it is one way that SMHS can provide an inviting, supportive and secure environment with access to a caring counselor and various mental health resources which our students need." SMSF proudly contributed \$97,000 for the District's Wellness Initiative, which funded the entirety of the proposed budget for this project during the 2018-2019 year. ■





Connecting With Our COMMUNITY





o support its unique role as the sole group responsible for raising financial support for faculty at all our schools, the Foundation regularly engages in outreach and events.

IN SEPTEMBER, to welcome new parents, the Foundation hosted the New Family Mixer at the Old Mill. At this historical venue, newcomers met each other, as well as Trustees, district and school administrators, and PTA leaders. A presentation explained the schools' need for volunteerism and financial generosity.

NEW DURING THE 2018-2019 YEAR, the Foundation hosted two Town Hall Meetings. Produced in collaboration with the District and the school board, the goal was to help parents and community members understand and engage important issues in the District. The November meeting covered how public school financing works and in March, the discussion focused on current curriculum and instruction.

FOUNDATION WEEK EVENTS on all four campuses helped build awareness of SMSF's role in supporting our schools. Special events were planned by Trustees and staff in coordination with the District and each school. Restaurant give-backs during the week also allowed everyone to support our schools by dining out.

INCREASED USE of focused social media and email campaigns kept parents and supporters informed about news and activities around our schools. Additionally, grassroots efforts like pop-up lemonade stands involved all ages.

THANKING SUPPORTERS PROVIDES the

Foundation an opportunity to acknowledge in different ways those who helped set the philanthropic pace for the year. In February 2019, donors of over \$10,000 for the year were invited to the Gold Sustainer Dinner held at the Huntington Library. In the spring, individuals, families and institutions who gave over \$5,000 were recognized with banners along Huntington Drive. In May, everyone who gave over \$2,500 enjoyed the Donor Recognition Party hosted at the home of former Dean of the USC Marshall School of Business, Jim and Gail Ellis. And, in a long-standing tradition, supporters who gave over \$100 were recognized with a yard sign which also helped underscore the Foundation's mission throughout the community.

THE SAN MARINO SCHOOLS FOUNDATION

is made up of approximately 30 Trustees consisting of parents, residents, and distinguished community members. Each Trustee brings a great amount of skill, community involvement, and knowledge to the Foundation that allows SMSF to continue engaging and evolving based on the needs of our students, parents, and community members.





The Barth ATHLETICS COMPLEX



he Barth Athletics Complex is a reality! Dedicated on August 10th, Huntington Middle School students now use it daily.

THE COMPLETION of the BAC represents what can be accomplished with San Marino's "can do" community spirit. Where a small, single use, masonry structure once stood for almost ninety years, the BAC now provides a state-of-the-art facility with a full gym, weight room, wrestling/multi-purpose room, locker rooms, and inspiring instructional spaces. The environment and facilities in which students learn play a key role in achieving the four-fold aim of excellence in academics, arts, athletics, and activities.

IN PARTNERSHIP WITH OUR SCHOOLS.

the philanthropic leadership of Avery and Andy Barth kindled the generosity of many important donors and the community support, making the accomplishment of this goal possible. SMSF is proud to have served as a nexus in this public-private partnership, collecting generous private donations to support this new, much-needed public capital asset.

IN ANNOUNCING HIS 2015 BUDGET PROPOSAL, former California governor Jerry Brown observed that "the future of school facilities funding... focuses on districts with the greatest need, while providing substantial new flexibility for local districts to raise the necessary resources."* With such changes emerging, the BAC serves as a successful model for the public-private partnerships which will likely be required to support the new

WITH EXPERIENCE GAINED on the BAC, providing such collaboration on future projects is a mission for which SMSF stands ready to lead. ■

facilities that educational excellence demands.

*Center for Cities + Schools, University of California, Berkeley

Ways to Give



Brochure cover photo from Excellence in Education, 1989

SAN MARINO SCHOOLS FOUNDATION is vital to the health of San Marino's schools. Our goal is to empower excellence by closing the gap between state funding and the cost of an exceptional education in California. New York students receive over \$18K per student, per year, which is double what our students receive from Sacramento. If our schools and students are going to compete nationally and internationally, we need to ensure competitive levels of funding.

PROP 13 PASSED IN 1978, changing the tax structure in the State of California. Local property taxes are no longer returned to local cities and schools, but instead, are kept at the State level. The Local Control Funding Formula, passed in 2013, goes further by determining state funding amounts based on demographics of student enrollment. Districts with higher numbers of students enrolled in free or reduced lunch programs, students who are foster youth, and/or students who are English Language Learners receive state funding bonuses. Since SMUSD has low student enrollment in these categories, we receive just over \$9,000 per student, which is 38% less than Los Angeles Unified Schools receive. Our State elected officials leave it up to local communities like San Marino to close the gap with local funding. This is the challenge the Foundation exists to address. Thus, it is up to community members and parents to make up the difference.

WHETHER YOU ARE A PARENT, GRANDPARENT, COMMUNITY MEMBER OR LOCAL BUSINESS, you can make your gift in several different ways. We have a giving plan that works for everyone — from \$5 student donations to \$200,000 estate gifts that endow a particular academic program in perpetuity. The Foundation works with donors to establish installment plans and to ensure that your giving experience is personalized and customized to your needs.

GIVING MADE EASY:

Foundation office for details.

PLANNED GIFTS: There are many ways to make San Marino Schools part of your estate plan. These include planned gifts and gifts of real estate. Also, local families establish memorial funds named for loved ones. Continue the San Marino Schools tradition as part of your legacy. Please contact the Foundation office for details on a customized approach to ensure your legacy lives on by changing the lives of students for years to come.

ALUMNI CLASS GIFTS/ENDOWMENTS: The Foundation encourages San Marino alumni to create endowed funds in the name of the class. Such gifts will provide ongoing support of educational excellence benefiting future students and can be matched to the interests of the class. These endowments can be refreshed at key reunions and reflect the legacy of a class in the history of San Marino schools to "pay it forward" to future generations of kids.

GIFTS OF STOCK / MANDATORY IRA DISTRIBUTIONS: A gift of appreciated stock/securities or mandatory IRA withdrawal is a very effective way to give. This type of giving can be combined with an endowment or a personalized giving approach. Please contact the

GRANDPARENTS/EXTENDED FAMILIES: Please make sure grandparents and extended family understand our funding needs. They could play a key role in contributing to our per student need. We are happy to reach out to them!

DONATE A VEHICLE: If you have a vehicle that you no longer use or are close to retiring, please contact the Foundation office for assistance in turning your old wheels into a gift for our schools.

MATCHING GIFTS: Double your donation! Please check with your employer to see if they participate in a corporate matching gift program.

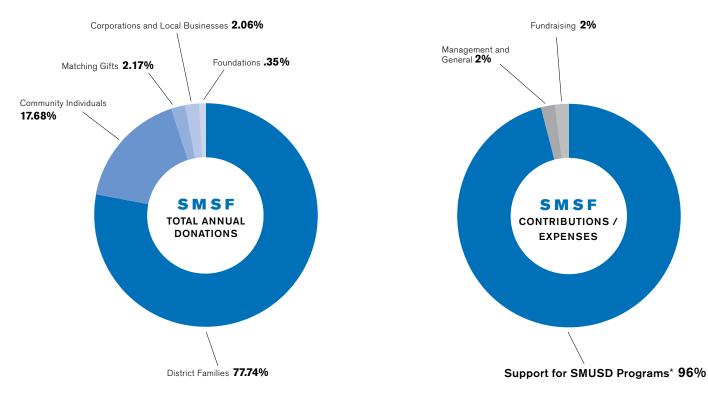
ONLINE: To make your one-time donation by credit card, visit smsf.org/donate.

BY MAIL: Send your check payable to: San Marino Schools Foundation, 1665 West Drive, San Marino, CA 91108

BY PHONE & PICK-UP AT YOUR HOME: Contact the SMSF office at 626.299.7014

RECURRING GIFTS / MONTHLY INSTALLMENT: A recurring monthly gift is an easy, affordable way to empower excellence in our schools. A yearly pledge can be charged monthly to your credit or debit card. Please contact the Foundation office for assistance, as SMSF will ensure that anyone interested sets up a monthly installment plan that works best for their current financial situation.

TELL A FRIEND: Finally, we can all be ambassadors for our students and schools. Each of us can remind family and friends to remember the Foundation if they are considering making a charitable gift. ■



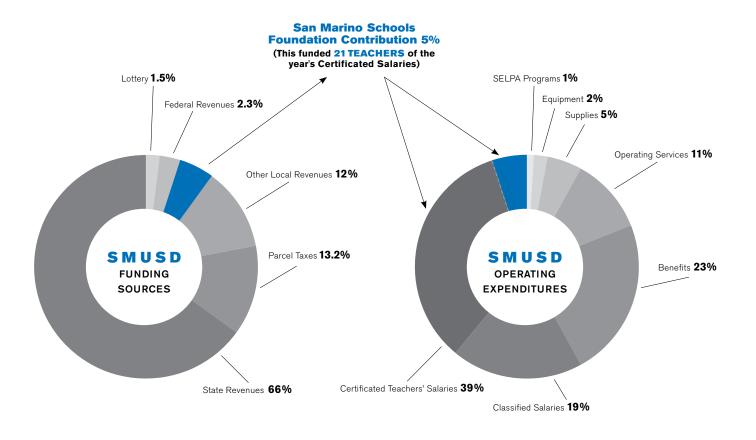
Total 2018-2019 Annual Campaign Donations **\$2,157,000**

STATEMENT OF FINANCIAL POSITION

June 30, 2019

Total Assets	\$5,125,325	Total Liabilities & Net Assets	\$5,125,325
		Unrestricted 	\$ 964,381
Endowment Fund	\$3,919,453	Temporarily Restricted	\$1,483,669
Cash and Cash Equivalents	\$1,205,872	Permanently Restricted	\$ 2,677,275
ASSETS:	6/30/19	LIABILITIES AND NET ASSETS:	6/30/19

SAN
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Empowering Excellence.



Total 2018-2019 Funding **\$43,136,653**

SMSF 2018-2019 GRANT MAKING PROCESS

he San Marino Schools Foundation awards grants each year in response to the needs the District defines and applies for. The first grant approved every year goes directly towards full-time teacher salaries.

FIVE YEARS AGO, the Foundation's Board of Trustees set the goal of applying best practices to all aspects of its operations to increase transparency, elevate accountability, and to properly reflect its 501c3 non-profit tax status. To accomplish this, SMSF established a process of awarding grants to the District following review by a

grants committee made up of Foundation Trustees. At the end of each year, the District reports to the Foundation confirming the funds were expended in accordance with the grant.

THIS GRANTING APPROACH allows the Foundation to continue its historical role of directly helping to close the gap between what state funding provides and what community expectations of educational excellence require. In keeping with contemporary best practices, the Foundation continues being responsive to our school district's needs and being responsible to its donors.

The San Marino Schools Foundation practices full transparency.

Audited financial statements are available on our website.

^{*}Includes restricted funds released to district.

Our Donors

The San Marino Schools Foundation thanks all of the following donors for contributions received from July 1, 2018 to June 30, 2019.

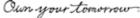
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UB OF S



BOSTON PRIVATE WEALTH - TRUST - PRIVATE BANKING







CALIFORNIA AMERICAN WATER

WE KEEP LIFE FLOWING





GOLD SUSTAINER

\$10,000 or more

Killackey Law Offices Schwah Charitable Fund

SILVER AMBASSADOR

\$5,000 to \$9,999

Boston Private Bank California Community Foundation Chinese Club of San Marino East West Bank The Hoffman Foundation **TMSmiles** Vanguard Charitable Endowment

PARTNER

\$2,500 to \$4,999

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\$1,000 to \$2,499

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FRIEND

\$500 to \$999

SMUSD Student Sponsored Lemonade Stand

CONTRIBUTOR

Up to \$499

Poon Holding, LLC Unistar Media & Events Class of 1958

UBS Donor-Advised Fund

SCHOOL FAMILY AND COMMUNITY DONORS

GOLD SUSTAINER

\$10,000 or more

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\$5,000 to \$9,999

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The Li Family*

Honor Roll: \$2,500 – 2,999 per student enrolled in the District . High Honors: \$3,000 or more per student enrolled in the District

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\$2,500 to \$4,999

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