



**Los Angeles County Committee on
School District Organization**
c/o Los Angeles County Office of Education
9300 Imperial Highway, Downey, CA 90242-2890

2024 Members

First Supervisorial District: John Nunez, John Quintanilla
Second Supervisorial District: Estefany Castaneda, Charles Davis
Third Supervisorial District: Ralph Mechur, Barry A. Snell
Fourth Supervisorial District: Donald LaPlante
Martha Deutsch – Vice Chairperson
Fifth Supervisorial District: Cherise Moore
Suzan T. Solomon - Chairperson
At Large: Frank Bostrom

July 22, 2024

TO: Members of the Los Angeles County Committee
on School District Organization (County Committee)

FROM: Octavio Castelo, Secretary
County Committee

SUBJECT: Regular Meeting of the County Committee – Wednesday, August 7, 2024

The regular meeting of the County Committee will be held at **9:30 a.m. on Wednesday, August 7, 2024.**
This meeting will be hybrid, with in-person, as well as the online opportunity to participate.
Connection information will be emailed to you in advance of the meeting.

Attached is the agenda for the meeting of August 7, 2024.

If you have questions, please call Dr. Allison Deegan at (562) 922-6336.

AD/EH:vb
Attachments



**Los Angeles County Committee on
School District Organization**
c/o Los Angeles County Office of Education
9300 Imperial Highway, Downey, CA 90242-2890

Agenda No. 4 – Calendar Year 2024

The agenda is accessible through the LACOE website at the following link:

<https://www.lacoe.edu/CountyCommittee/Agendas>

Procedures for addressing the County Committee can be found on its website. To request a disability-related accommodation under the ADA, please call Ms. Victoria Bernstein at (562) 922-6131 at least 24 hours in advance.

For members of the public, use the following phone number to call into the meeting: 1-669-900-9128

Webinar ID: 861 9810 0117

Passcode: 028856

The public may also view the meeting via the following link:

<https://lacoe-edu.zoom.us/j/86198100117?pwd=azZlchY4b1dqVBqOVVhem8wVi9CUT09>

Password: 028856

PUBLIC COMMENT IN ADVANCE: To provide public comment in advance, you may also submit written comments or documentation by e-mail to: Bernstein_Victoria@lacoe.edu or you may record a voicemail with your comments by calling: (562) 922-6131.

- Any advance public comment or documentation must be submitted no later than 4:00 p.m. the Wednesday before the scheduled meeting (one week before the meeting date).
- Please include your name, phone number, specific agenda item, and meeting date in your correspondence.
- Correspondence received shall become part of the administrative record.

**County Committee on School District Organization
Regular Meeting – Hybrid (In-person, as well as remote online access)
9300 Imperial Highway, Board Room
Downey, CA 90242
June 5, 2024
9:30 A.M.**

*I Information
D Discussion
A Action*

Speaker	Item	Notes
Ms. Solomon	I. CALL TO ORDER – 9:30 A.M.	<i>I, D, A</i>
Ms. Solomon	II. PLEDGE OF ALLEGIANCE	<i>I, D, A</i>
Ms. Solomon	III. ROLL CALL	<i>I, D, A</i>

Speaker	Item	Notes
Ms. Solomon	IV. ESTABLISHMENT OF QUORUM	<i>I, D, A</i>
Ms. Solomon	V. ORDERING OF THE AGENDA	<i>I, D, A</i>
Ms. Solomon	VI. APPROVAL OF THE MINUTES - Attachment June 5, 2024	<i>I, D, A</i>
Ms. Solomon Mr. Castelo	VII. COUNTY COMMITTEE COMMUNICATIONS The Chair may address Communications.	<i>I, D, A</i>
Ms. Solomon	VIII. PUBLIC COMMENTS ON OPEN SESSION ITEMS Access for members of the public to observe and offer public comment: Connection information was provided to the Public for those who wish to remotely attend the County Committee meeting as a listener or to make public comment. Public comment received by 4:00 p.m. the Wednesday before the meeting (one week before the meeting date) becomes part of the administrative record.	<i>I, D, A</i>
Ms. Solomon Mr. Castelo	IX. ANNOUNCEMENTS	<i>I, D, A</i>
Ms. Solomon Mr. Castelo	X. CORRESPONDENCE	<i>I, D, A</i>
Ms. Solomon	XI. PUBLIC INTEREST ITEMS / COMMITTEE MEMBER ANNOUNCEMENTS	<i>I, D, A</i>
Ms. Solomon	XII. CONSENT CALENDAR	<i>I, D, A</i>
Ms. Solomon	XIII. PRESENTATIONS	<i>I, D, A</i>
Ms. Solomon	XIV. REPORTS / STUDY TOPICS	<i>I, D, A</i>
Ms. Solomon	XV. RECOMMENDATIONS	<i>I, D, A</i>
Ms. Solomon	XVI. HEARINGS	<i>I, D, A</i>
Ms. Solomon	XVII. INFORMATIONAL ITEMS	<i>I, D, A</i>
Ms. Solomon Mr. Castelo Dr. Deegan	A. UPDATE ON PETITION TO TRANSFER TERRITORY FROM THE GLENDALE USD TO THE LA CAÑADA USD An update will be provided to the County Committee on the status of the petition.	<i>I, D, A</i>

Ms. Solomon Mr. Castelo Ms. Cervera Dr. Deegan	B. UPDATE ON PETITION TO FORM A MALIBU USD FROM TERRITORY WITHIN THE SANTA MONICA-MALIBU USD An update will be provided to the County Committee on the status of the petition.	<i>I, D, A</i>
Ms. Solomon Mr. Castelo Dr. Deegan Mr. Hass	C. CALIFORNIA VOTING RIGHTS ACT (CVRA) An update may be provided to the County Committee on local, state, and national activity related to the CVRA.	<i>I, D, A</i>
Ms. Solomon Mr. Castelo Dr. Deegan Mr. Hass	D. LEGISLATIVE UPDATE - Attachment An update may be provided to the County Committee on legislation that may impact the school district organization process.	<i>I, D, A</i>
Ms. Solomon Mr. Castelo Dr. Deegan	E. UPDATE ON LOS ANGELES USD (LAUSD) REORGANIZATION PROPOSALS - Attachment An update may be provided to the County Committee on recent activity related to school district organization proposals pertaining to LAUSD.	<i>I, D, A</i>
Ms. Solomon Mr. Castelo Dr. Deegan	H. UPDATE ON LOS ANGELES COUNTY REORGANIZATION PROPOSALS EXCLUDING THOSE AFFECTING THE LAUSD - Attachment An update may be provided to the County Committee on recent activity related to school district organization proposals pertaining to districts other than LAUSD.	<i>I, D, A</i>
Ms. Solomon Mr. Castelo Dr. Deegan	I. COUNTY COMMITTEE COMMUNICATIONS, MEETING SCHEDULE, ESTABLISHMENT OF MEETING TIMES, FUTURE AGENDA ITEMS, FOLLOW UP The Chair may provide reminders about any upcoming public hearings, meetings, and any other matters.	<i>I, D, A</i>
Ms. Solomon	XVIII. ADJOURNMENT	<i>I, D, A</i>

**UNAPPROVED MINUTES OF THE
LOS ANGELES COUNTY COMMITTEE ON SCHOOL DISTRICT ORGANIZATION
Hybrid Meeting
June 5, 2024**

*County Committee
Meeting June 5, 2024*

The Los Angeles County Committee on School District Organization (County Committee) held a hybrid meeting on Wednesday, June 5, 2024. The meeting was called to order at 9:33 a.m. by Ms. Suzan Solomon.

Members Present

Frank Bostrom
Charles Davis
Martha Deutsch
Donald LaPlante
Ralph Mechur
John Nunez
John Quintanilla
Barry Snell
Suzan Solomon

Absent

Estefany Castaneda
Dr. Cherise Moore

Staff Present

Octavio Castelo, Secretary
April Mitchell, Staff
Dr. Allison Deegan, Staff
Eric Hass, Staff
Victoria Bernstein, Staff

Item	Description																											
Call to Order	Ms. Suzan Solomon called the County Committee meeting to order at 9:33a.m.																											
Pledge of Allegiance	Mr. Frank Bostrom led the flag salute.																											
Roll Call	Roll call was conducted. Attendance is as follows: <table><tr><td>Mr. Frank Bostrom</td><td>Yes</td><td>Dr. Cherise Moore</td><td>Absent</td></tr><tr><td>Ms. Estefany Castaneda</td><td>Absent</td><td>Mr. John Nunez</td><td>Yes</td></tr><tr><td>Mr. Charles Davis</td><td>Yes</td><td>Mr. John Quintanilla</td><td>Yes</td></tr><tr><td>Ms. Martha Deutsch</td><td>Yes</td><td>Mr. Barry Snell</td><td>Yes</td></tr><tr><td>Mr. Donald LaPlante</td><td>Yes</td><td>Ms. Suzan Solomon</td><td>Yes</td></tr><tr><td>Mr. Ralph Mechur</td><td>Yes</td><td></td><td></td></tr></table>				Mr. Frank Bostrom	Yes	Dr. Cherise Moore	Absent	Ms. Estefany Castaneda	Absent	Mr. John Nunez	Yes	Mr. Charles Davis	Yes	Mr. John Quintanilla	Yes	Ms. Martha Deutsch	Yes	Mr. Barry Snell	Yes	Mr. Donald LaPlante	Yes	Ms. Suzan Solomon	Yes	Mr. Ralph Mechur	Yes		
Mr. Frank Bostrom	Yes	Dr. Cherise Moore	Absent																									
Ms. Estefany Castaneda	Absent	Mr. John Nunez	Yes																									
Mr. Charles Davis	Yes	Mr. John Quintanilla	Yes																									
Ms. Martha Deutsch	Yes	Mr. Barry Snell	Yes																									
Mr. Donald LaPlante	Yes	Ms. Suzan Solomon	Yes																									
Mr. Ralph Mechur	Yes																											
Establishment of Quorum	Quorum was established.																											

<i>Ordering of the Agenda</i>	The ordering of the agenda stands. No recommendations to reorder the agenda were received.			
<i>Approval of Minutes of March 6, 2024</i>	It was MOVED by Mr. Bostrom and SECONDED by Mr. Nunez. Votes are as follows:			
	Mr. Frank Bostrom	Yes	Dr. Cherise Moore	Absent
	Ms. Estefany Castaneda	Absent	Mr. John Nunez	Yes
	Mr. Charles Davis	Yes	Mr. John Quintanilla	Yes
	Ms. Martha Deutsch	Yes	Mr. Barry Snell	Yes
	Mr. Donald LaPlante	Yes	Ms. Suzan Solomon	Yes
	Mr. Ralph Mechur	Yes		
<i>County Committee Communications</i>	An article was given to the County Committee pertaining to Santa Monica-Malibu USD.			
<i>Public Comments on Open Session Items</i>	None at this time.			
<i>Announcements</i>	Mr. Castelo thanked all trustees for a successful school year.			
<i>Correspondence</i>	None at this time.			
<i>Public Interest Items/ Committee Member Announcements</i>	None at this time.			
<i>Consent Calendar</i>	None at this time.			
<i>Presentations</i>	None at this time.			
<i>Reports/Study Topics</i>	The Policies Subcommittee will resume meeting in the Fall.			
<i>Recommendations</i>	None at this time.			
<i>Hearings</i>	None at this time.			
<i>Informational Items</i> <i>A. Petition to Implement Trustee Areas and Trustee Area Voting in the Monrovia Unified School District</i>	A. Dr. Deegan reported that the petition to move to trustee areas, adopt the submitted map, and seek a waiver for confirming the election on the trustee area plan from Monrovia USD was received on May 23 rd . Public hearings were immediately scheduled after confirming the Committee's availability, with the hearing set for June 17 th . The Committee will receive the special meeting agenda, hearing guidelines, and the staff report, which will reflect the materials submitted to date. During the public hearing, a presentation will be given, followed by a special meeting where action on the petition will be taken, if chosen.			

<p><i>Informational Items</i></p> <p><i>B. Petition to Implement Trustee Areas and Trustee Area Voting in the Bellflower Unified School District</i></p>	<p>B. Dr. Deegan reported that the petition to move to trustee areas, adopt the submitted map, and seek a waiver for confirming the election on the trustee area plan from Bellflower USD was received on May 24th. The public hearing and special meeting are scheduled for June 10th. The Committee will receive the special meeting agenda, hearing guidelines, and the staff report, which will reflect the materials submitted to date. During the public hearing, a presentation will be given, followed by a special meeting where action on the petition will be taken, if chosen.</p>
<p><i>Informational Items</i></p> <p><i>C. Update in the Petition to Transfer Territory from the Glendale Unified School District to the La Cañada Unified School District</i></p>	<p>C. Dr. Deegan gave the following update: the petition was approved by the State Board of Education and will now go to an election. The election has been ordered, and we are working with the registrar to certify the election area, which includes approximately 900 homes in the City of La Cañada within Glendale USD. The ballot initiative requires statements from the County Superintendent of Schools and a ballot statement from a County Committee member who approved and one that denied the petition. Statements from Chair Solomon and Mr. Nunez have been secured. The registrar has a limited timeframe to print the ballots, and we are coordinating with the community and districts. If approved, the territory transfer may be effective on July 1 of 2025 or 2026, with 2026 being more realistic. Multiple agencies will be involved, and we are working to expedite the process and manage expectations regarding the timelines. We will continue to monitor the situation and keep the committee informed as we work with the relevant agencies to complete the transfer.</p>
<p><i>Informational Items</i></p> <p><i>D. Update on Petition to Form a Malibu Unified School District from Territory within the Santa Monica-Malibu Unified School District</i></p>	<p>D. Mr. Davis stated that at the last County Committee meeting, some members, though perhaps not the majority, requested setting public hearings to move forward on this issue. He questioned when the two entities would be required to come in and defend their positions and expressed his frustration over the delay. He emphasized the need to know the status of the negotiations and when a hearing would be scheduled to vote on the issue.</p> <p>Chair Solomon explained that both parties involved in the negotiations requested additional time. As a result, the decision was made to postpone the hearings accordingly. To provide a more detailed response to Mr. Davis's question, Chair Solomon deferred to Dr. Deegan to provide her report.</p> <p>Dr. Deegan said staff attended a discussion with representatives from the City of Malibu, Santa Monica-Malibu USD, their facilitator, and consultants. Staff initially gathered availability for hearings on the petition, and there was sentiment to hear it. However, during the meeting, it was explained that they are currently only part way through the first agreement of at least three. Hearing the petition now would be premature as negotiations are still in progress. The review of this petition has been unusually long, involving multiple negotiating teams and</p>

	<p>consultants over many years. Recently, the first elements of the potential agreement were presented to some members of the public for feedback. Although no agreement has been finalized, there is momentum in the negotiations. The committee has shown patience, granting additional time upon multiple requests from the parties involved. Given the significant financial and educational impact of creating a new unified school district, the committee must decide on the best timing for hearings. While waiting indefinitely is ineffective, holding hearings before negotiations are complete may also be premature.</p> <p>Ms. Wood and Mr. Soldani provided updates to the Committee.</p>																								
<p><i>Informational Items</i></p> <p><i>E. California Voting Rights Act (CVRA)</i></p>	<p>E. Mr. Hass shared that the majority of activity is in Orange County, where one of the largest cities is fighting a demand letter, and another city has recently conceded. Central California also has a lot of activity brewing. We have public hearings scheduled for two districts in the next two weeks.</p>																								
<p><i>F. Legislative Update</i></p>	<p>F. Mr. Hass stated that we have been tracking five pieces of legislation, with four showing recent activity. AB 3140 has stalled and will no longer be followed. We will continue to track the remaining four bills.</p>																								
<p><i>G. Update on LAUSD Reorganization Proposals</i></p>	<p>G. None at this time.</p>																								
<p><i>H. Update on Los Angeles County Reorganization Proposals Excluding Those Affecting the LAUSD</i></p>	<p>H. None at this time.</p>																								
<p><i>I. County Committee Communications, Meeting Schedule, Establishment of Meeting Times, Future Agenda Items, Follow Up</i></p>	<p>I. Ms. Solomon reminded the Committee that there is a hearing on Monday, June 10, 2024, at Bellflower USD at 6 PM, and another on Monday, June 17th, 2024, at the Monrovia USD at 6 PM. The next regular meeting of the County Committee is scheduled for July 3rd.</p>																								
<p><i>Adjournment</i></p>	<p>It was MOVED by Mr. Bostrom and SECONDED by Mr. Snell. Votes are as follows:</p> <table><tr><td>Mr. Frank Bostrom</td><td>Yes</td><td>Dr. Cherise Moore</td><td>Absent</td></tr><tr><td>Ms. Estefany Castaneda</td><td>Absent</td><td>Mr. John Nunez</td><td>Yes</td></tr><tr><td>Mr. Charles Davis</td><td>Yes</td><td>Mr. John Quintanilla</td><td>Yes</td></tr><tr><td>Ms. Martha Deutsch</td><td>Yes</td><td>Mr. Barry Snell</td><td>Yes</td></tr><tr><td>Mr. Donald LaPlante</td><td>Yes</td><td>Ms. Suzan Solomon</td><td>Yes</td></tr><tr><td>Mr. Ralph Mechur</td><td>Yes</td><td></td><td></td></tr></table>	Mr. Frank Bostrom	Yes	Dr. Cherise Moore	Absent	Ms. Estefany Castaneda	Absent	Mr. John Nunez	Yes	Mr. Charles Davis	Yes	Mr. John Quintanilla	Yes	Ms. Martha Deutsch	Yes	Mr. Barry Snell	Yes	Mr. Donald LaPlante	Yes	Ms. Suzan Solomon	Yes	Mr. Ralph Mechur	Yes		
Mr. Frank Bostrom	Yes	Dr. Cherise Moore	Absent																						
Ms. Estefany Castaneda	Absent	Mr. John Nunez	Yes																						
Mr. Charles Davis	Yes	Mr. John Quintanilla	Yes																						
Ms. Martha Deutsch	Yes	Mr. Barry Snell	Yes																						
Mr. Donald LaPlante	Yes	Ms. Suzan Solomon	Yes																						
Mr. Ralph Mechur	Yes																								



Christine N. Wood
Partner
(213) 542-3861
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July 11, 2024

VIA E-MAIL

Dr. Allison Deegan
Los Angeles County Office of Education
9300 Imperial Highway
Downey, California 90242
Email: deegan_allison@laoe.edu

Re: City of Malibu's Petition to Form a Malibu USD from Territory within the Santa Monica-Malibu USD

Dear Dr. Deegan:

I am writing on behalf of the City of Malibu ("City") to request that the County Committee on School District Organization ("County Committee") schedule hearings on the City's 2017 Petition to Form a Malibu USD from Territory within the Santa Monica-Malibu USD ("SM-MUSD" or the "District"), pursuant to Education Code section 35721(c).

As you may recall, the City and the District appeared before the County Committee at its June meeting to report that the parties were still engaged in a mediation process. For the past two years, this process that has been governed by two guiding principles:

(1) formation of an independent Malibu Unified School District is in the best interest of all students; and

(2) each successor educational entity is to be allocated a sufficient share of funding to provide similar level of service at each school site as prior to separation.

It is with a commitment to these two guiding principles that the City asks the County Committee to commence with its hearings on the City's Petition as soon as possible. City residents who have had high expectations that the City's 2017 petition would have resulted in an independent Malibu USD by now cannot wait any longer. The City had hoped the District would join us in this effort, but understands that the District will now oppose the City's petition, despite all of the progress the parties have made over the past two years.

Please feel free to contact me with any questions or concerns.

Dr. Allison Deegan
July 11, 2024
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Regards,

A handwritten signature in dark ink, appearing to read "CWood". The signature is fluid and cursive, with the first letter "C" being large and stylized.

Christine N. Wood
Deputy City Attorney

CNW

ATKINSON, ANDELSON, LOYA, RUUD & ROMO

A PROFESSIONAL LAW CORPORATION

ATTORNEYS AT LAW

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July 17, 2024

VIA EMAIL

Los Angeles County Committee on School District Organization
c/o Los Angeles County Office of Education
9300 Imperial Highway
Downey, California 90242-2890

Re: City of Malibu Request to Set Public Hearing on its 2017 Petition for Unification

Dear Committee Members:

I am writing on behalf of the Santa Monica-Malibu Unified School District Unification Subcommittee ("Subcommittee") in response to the letter transmitted to Dr. Allison Deegan on July 11, 2024, from the City of Malibu's legal counsel, Christine Wood. In that letter, Ms. Wood requests the County Committee "schedule hearings on the City's 2017 Petition to Form a Malibu USD . . . as soon as possible."

This request unfortunately ignores the timeline previously agreed to between the parties which was memorialized in a letter I sent to the Committee on June 14, 2024. In that timeline, public hearings were only to occur *after* November of 2024.

As this Committee is aware, the District vehemently opposes the 2017 Petition for many of the same reasons articulated in your outside consultant's analysis and report highlighting the fact that 7 of the 9 criteria fail under that Petition.

Since that time, the parties have worked together in mediation to craft a unification solution that is equitable to both sides and ensures that both districts are viable and sustainable independent school districts. That solution is very close at hand, with the mediating teams making efforts to finalize the three agreements that will: define the allocation and sharing of revenues, the transition of operations, allocation of assets and liabilities, and execution of annual computations to maintain the agreed upon equitable opportunities in both communities. However, none of these agreements have been fully completed or ratified by either party.

Without these agreements, unification simply doesn't work. The concepts and approach developed through extensive mediation sessions are not mutually independent and the interplay

ATKINSON, ANDELSON, LOYA, RUUD & ROMO

Los Angeles County Committee on School District Organization
c/o Los Angeles County Office of Education
July 17, 2024
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between them requires that they be considered as an entire package to ensure all aspects of the agreements required to achieve equity are in place.

Regrettably, instead of working collaboratively to finalize these agreements, the City has unilaterally and prematurely decided to walk away and pursue its original 2017 Petition. Should this Committee proceed with the requested hearings prior to November of 2024, it will once again preside over a hearing process involving the 2017 Petition; a petition that simply doesn't work and that will, of necessity, be strongly opposed by the District and its community.

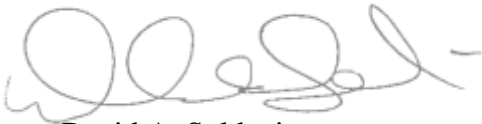
It is important to note that though the City may attempt to introduce work product and partially-completed agreements in support of its 2017 Petition, I must inform this Committee that all such work is protected by the mediation privilege of Evidence Code 1119 by agreement of the parties and as such, may not be introduced by the City in this proceeding nor considered in any way by the Committee in its deliberations on the 2017 Petition, which must petition be decided *as submitted*, as no other version has been provided by the City nor subjected to the required unification processes set forth in the Education Code.

The District hopes the Committee will honor the parties' originally agreed upon timeline by setting any public hearings on this matter *after* November of 2024. Doing so could give the parties additional time to finalize and approve all of the agreements necessary to create a viable and approvable Petition and could obviate the need for a contested hearing.

Please contact the undersigned with any questions or concerns regarding the foregoing.

Very truly yours,

ATKINSON, ANDELSON, LOYA, RUUD & ROMO



David A. Soldani
Counsel for SMMUSD

DAS:las

cc: Allison Deegan, Ed.D (Deegan_Allison@laoe.edu)
Eric Hass (Hass_Eric@laoe.edu)
Octavio Castelo (Castelo_Octavio@laoe.edu)
Michelle Cervera, Esq. (MCervera@counsel.lacounty.gov)
Christine Wood (christine.wood@bbklaw.com)
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July 19, 2024

VIA E-MAIL

Dr. Allison Deegan
Los Angeles County Office of Education
9300 Imperial Highway
Downey, California 90242
Email: deegan_allison@laoe.edu

Re: Response to July 17, 2024, letter from Santa Monica-Malibu USD re Request for Hearings in City of Malibu's Petition to Form a Malibu USD from Territory within the Santa Monica-Malibu USD

Dear Dr. Deegan:

The City of Malibu ("City") transmits this correspondence in hopes of correcting misstatements in the July 17, 2024, letter sent by David Soldani on behalf Santa Monica-Malibu Unified School District ("SM-MUSD" or the "District"). Please find a copy of the July 17, 2024, letter from SM-MUSD attached hereto as Attachment 1. The City of Malibu ("City") transmits this correspondence in hopes of correcting misstatements in the July 17, 2024, letter sent by David Soldani on behalf Santa Monica-Malibu Unified School District ("SM-MUSD" or the "District"). Please find a copy of the July 17, 2024, letter from SM-MUSD attached hereto as Attachment 1.

First, the District relies on the timeline that the parties agreed to in May as evidence that the City's request for hearings is untimely. The timeline, which is attached hereto as Attachment 2, provided that both parties would participate in "Community Engagement on the Full Unification Package" in the month of July. That has not occurred because the parties have been at a virtual stalemate since the parties agreed to this timeline. Furthermore, the last two mediation sessions have been unproductive and particularly punctuated by the fact that only one of the three District subcommittee board members attended those mediation sessions. Once the parties were not able to meet the first two deliverables of that timeline, the City recognized that the November target dates had been abandoned. It is notable that this latest timeline was established only after several earlier missed timelines by the District. Hence, the City felt it was the best use of its resources to return to the County Committee as an alternative path.

Second, the City articulated to the District—and *still maintains*—that it is willing to attend any and all mediation sessions in the future. These sessions have been helpful in identifying a sound

VIA E-MAIL

Dr. Allison Deegan

July 19, 2024

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fiscal path for two independent school districts, and the City is very much committed to continuing these discussions if possible. However, the District, not the City, has refused to attend any future mediation sessions because of the City's decision to return to the County Committee for redress. The City rejects this ultimatum by the District. Residents of Malibu and the students served by the District have waited many years for a decision on the City's petition, and the City was patient while the District asked for a reprieve to deal with the CVRA petition last year. The City and its residents are no longer satisfied with the District's relaxed and leisurely pace. The parties agree that separation is in the best interest of all students; hence, separation needs to happen as quickly as possible—whether that be through a negotiated agreement or through the County Committee hearing process.

Finally, the District's claims that the City is bound by its 2017 Petition is a misrepresentation of the next steps. The City stands by its 2017 Petition and will supplement it with an updated feasibility study that demonstrates compliance with the nine criteria set forth in Education Code section 35753. District representatives have stood before the County Committee and declared that the parties were on the precipice of an agreement. Further, the terms of our financial agreement have been mostly shared with the public at public meetings. (At the links provided below, you can watch a recording of the City's special meeting on April 10, 2024, and view the District's presentation from its May 22, 2024, special meeting.) It would be unwise and imprudent to ignore all of that progress. Instead, the City intends to present the crux of those principles to the County Committee through its feasibility study. Again, it hopes the District would join these efforts since the City and the District have publicly agreed that separation is in the best interest of all students. However, as the County Committee is well aware, the District's impulse to fight and obstruct often impedes progress, which is one of several reasons why Malibu residents are eager for local control.

Again, the City hopes to have hearings on its 2017 Petition as soon as possible and will notify the County Committee if the District returns to mediation and the parties are able to otherwise reach a negotiated agreement.

cc:

Octavio Castelo (castelo_octavio@laoe.edu)

Michelle Cervera, Esq. (mcervera@counsel.lacounty.gov)

Allison Deegan, Ed.D (deegan_allison@laoe.edu)

Eric Hass (hass_eric@laoe.edu)

Steve McClary, City of Malibu (smcclary@malibucity.org)

Antonio Shelton (ashelton@smmusd.org)

David Soldani (dsoldani@aalrr.com)

Suzan Solomon, County Committee (ssolomon@newhallsd.com)

VIA E-MAIL

Dr. Allison Deegan
July 19, 2024
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Meeting Links

- [Malibu City Council Special Meeting – April 10, 2024](#)
- [SM-MUSD Special Board Meeting – May 22, 2024](#)

Respectfully,

Christine N. Wood
of BEST BEST & KRIEGER LLP

CNW

The Malibu Times – Judy Abel – 07.18.24

Separation Setback

The Santa Monica Malibu Unified School District is opposing the City of Malibu's unification petition. The two sides that agreed in principle to separate into two school districts entered into a mediation process in 2022. The City of Malibu placed its unification petition with the county on hold while mediation was underway. The City however opted to pursue its petition once again when mediation stalled repeatedly. The 2017 petition which underwent several public hearings in both communities was found insufficient by the county.

SMMUSD issued a statement July 18 stating: "After two years of collaborative work through the mediation process, SMMUSD and the City of Malibu agreed upon a general timeline for completion of the unification process with each entity voting on the entire unification package by the end of October. By this time, community members in Santa Monica and Malibu would have had adequate time to review the three agreements that form the basis for a viable unification process: a revenue sharing agreement, an operations transfer agreement, and a joint powers agreement. However, the District was informed that the City no longer is honoring this mutually agreed upon timeline and instead is seeking a vote on the 2017 petition it previously submitted. As the petition does not meet at least seven of the nine criteria needed for unification and would impose devastating hardships upon students in the Santa Monica area, the District has no choice but to oppose this petition vehemently."

SMMUSD Board of Education Vice President and unification sub-committee member Jon Kean shared, "after years of work we were less than three months away from forming two independent school districts that could provide similar programs to what exists today on day one of operation. More work was needed to finalize the agreements but to walk away from a potential solution that meets the core tenets of our mediation and long held goals is the City's choice and it is unconscionable. In three months we could have achieved what community members have sought for decades."

SMMUSD attorney David Soldani said of Malibu in the statement: "Going back to a fatally flawed 2017 petition is a baffling decision and the District has no choice but to fight the City of Malibu's attempt to disenfranchise SMMUSD students residing in Santa Monica."

Malibu City Councilmember who serves on the School Separation Ad Hoc Committee Paul Grisanti said, "Our pursuit of an independent school district is about empowering our community to take charge of our educational future. We believe that local control will lead to more responsive and effective educational policies that directly benefit our students."

[https://smdp.com/2024/07/19/stalled-negotiations-prompt-malibu-to-ask-county-to-restart-process-for-independent-school-district/?utm_medium=email&utm_source=ActiveCampaign&utm_campaign=Newspack%20Newsletter%20\(116447\)](https://smdp.com/2024/07/19/stalled-negotiations-prompt-malibu-to-ask-county-to-restart-process-for-independent-school-district/?utm_medium=email&utm_source=ActiveCampaign&utm_campaign=Newspack%20Newsletter%20(116447))

Santa Monica Daily Press – by Matthew Hall – July 19, 2024

Plans for an independent Malibu school district could go back to the drawing board

The seemingly unending process to establish a standalone school district in Malibu is taking yet another detour but whether the process is derailed, or just delayed, is yet to be seen.

On July 18, the City of Malibu announced it has reactivated a County regulatory process to create its own school district.

The move came as a surprise to many after two years of what appeared to be progress in the slowly moving discussions to strike a deal between the City and the Santa Monica Malibu Unified School District.

The City of Malibu has spent years advocating for its own school system arguing that it is underrepresented by the joint school board due to a lack of voting power and that the needs of Malibu students are not adequately met by the Santa Monica-based district administration.

The City began a formal process with the Los Angeles County Office of Education in 2017 to ask for a split but paused that application in 2022 when both sides released the terms of a proposed agreement.

“After extensive conversations, negotiations and mediations, both the City of Malibu and the Santa Monica-Malibu Unified School District agree that it is now in the best interest of all students that a mutually agreed to process for the formation of an independent Malibu Unified School District and Santa Monica Unified School District be pursued jointly by the two parties,” said the document. The general terms of the split were that the proposed Santa Monica Unified School District would retain all school sites in the City of Santa Monica as well as all local revenues; the same would be true for Malibu under a new Malibu Unified School District, with the addition of revenue from the unincorporated portions of LA County often referred to as “unincorporated Malibu.”

At that time, a date of July 2024 had been floated as the earliest potential date for the two cities to split. However, the major sticking point in negotiations, potential

loss of funding for Santa Monica students after Malibu departs, quickly scuttled that timeline.

A fiscal deal was announced last year under which Malibu would make annual payments to Santa Monica schools to ensure funding levels remain consistent, with a 4% annual growth rate for about 18 years.

The revenue sharing involved two main calculations: a base year calculation and an annual calculation. The base year calculation establishes a funding target based on the cost to serve Malibu students, adjusted per pupil, multiplied by the number of students in Santa Monica schools. If Santa Monica's revenues fall below this target, Malibu will cover the shortfall through property tax transfers.

Subsequent years would see the funding target increase by 4% annually. If Santa Monica's revenues exceed this target, no transfer is required from Malibu for that year. The revenue sharing continues until termination, which can occur after three consecutive years without a transfer or in 2041-42, with tapering payments leading to termination by 2051-52 if transfers are less than \$5 million.

Both sides had protections in the agreement, including adjustments if transfers cause undue fiscal pressure on Malibu and guaranteed annual revenue growth for Santa Monica schools. Despite what appeared to be progress on the finances, Malibu said other negotiations stalled.

“Although the parties had reached an agreement on a Revenue Sharing Agreement, the recent mediation sessions had not yielded progress on the two remaining agreements: the Operational Agreement and the Joint Powers Authority Agreement,” said the City of Malibu in a statement. “Consequently, the City believes it is a better use of its resources to return to the County Committee process. By resuming the petition process with the County Committee, the City aims to gain greater control over educational resources, curricula, and school management, ensuring that the unique characteristics of the community are effectively addressed. Put simply, this move will allow Malibu to achieve local control as quickly as possible.”

Malibu formally asked for the county process to be restarted on July 11.

“We have made every possible effort to work through mediation with SM-MUSD, but unfortunately, we could not find a solution that adequately reflects the interests and aspirations of our community,” said Malibu Mayor Doug Stewart in a written

statement. “Our priority remains to provide our children with the best possible educational environment, tailored to the specific needs of Malibu.”

The school district said Malibu’s decision to withdraw from the process and pursue a County solution was “baffling” as the petition is insufficient under County rules and hurts Santa Monica students.

“After years of work we were less than three months away from forming two independent school districts that could provide similar programs to what exists today on day one of operation,” said SMMUSD Board of Education Vice President and unification sub-committee member Jon Kean. “More work was needed to finalize the agreements but to walk away from a potential solution that meets the core tenets of our mediation and long held goals is the City’s choice and it is unconscionable. In three months we could have achieved what community members have sought for decades.”

Kean said SMMUSD would return to the negotiations to hammer out the final details but only if Malibu pauses its petition.

“We are extremely disappointed that the City has chosen this path that will now inevitably delay this process by many years,” said Kean. “Our hope is that the County Committee honors the agreed upon timeline and delays this petition so we can finish unification once and for all.”



**Los Angeles County Committee on
School District Organization**
c/o Los Angeles County Office of Education
9300 Imperial Highway, Downey, CA 90242-2890

Attachment

**LOS ANGELES COUNTY COMMITTEE ON SCHOOL DISTRICT
ORGANIZATION (COUNTY COMMITTEE)
LEGISLATIVE REVIEW – AUGUST 2024**

BILL NUMBER/AUTHOR:	INTRODUCTION DATE:	LAST ACTIVITY/DATE:
Assembly Bill 453 / Cervantes	02/06/23	06/26/24: Re-referred to Senate Appropriations Committee.

DESCRIPTION OF BILL

This bill would require that when any public hearing concerning the change to district-based elections is consolidated with a meeting that includes other substantive agenda items, to begin the public hearing at a fixed time regardless of its order on the agenda, and notice of the hearing must be given to the public.

**POTENTIAL IMPACT OF BILL ON LOS ANGELES COUNTY COMMITTEE, SCHOOL
DISTRICT ORGANIZATION PROCESS AND/OR LOS ANGELES COUNTY SCHOOL
DISTRICTS**

School districts going through the process of implementing Trustee Areas (TA) and Trustee Area Voting (TAV) would need to ensure they comply with the bill by providing notice of the hearing with its specific commencement time. If the hearing is combined with a meeting, the agenda items will need to have their time allotments coordinated so that the hearing can occur at its scheduled time.

RECOMMENDED POSITION

Staff recommends the following position:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Watch | Bill should be monitored by County Committee staff, but no action taken at this time. |
| <input type="checkbox"/> Approve | County Committee supports the bill's concept, but will not actively work for passage. |
| <input type="checkbox"/> Support | County Committee actively supports the bill. |
| <input type="checkbox"/> Oppose | County Committee actively opposes the bill. |
| <input type="checkbox"/> Disapprove | County Committee disapproves of the bill's concept, but will not actively oppose passage. |

BILL NUMBER/AUTHOR: Senate Bill 1209 / Cortese	INTRODUCTION DATE: 02/15/24	LAST ACTIVITY/DATE: 06/24/24: Read second time in Assembly. Ordered to a third reading.
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DESCRIPTION OF BILL

This bill would authorize the LAFCO to require, as a condition for, among other things, processing a change of organization or reorganization, that the applicant agrees to defend, indemnify, and hold harmless the LAFCO, its agents, officers, and employees from and against any claim, action, or proceeding, as specified, arising from or relating to the action or determination by the LAFCO.

POTENTIAL IMPACT OF BILL ON LOS ANGELES COUNTY COMMITTEE, SCHOOL DISTRICT ORGANIZATION PROCESS AND/OR LOS ANGELES COUNTY SCHOOL DISTRICTS

This bill may result in reducing LAFCO's hesitation to approve proposals for which there are liability concerns inherent to the organization or reorganization, or in which there could be negative ramifications for an entity and/or its stakeholders at some point in the future.

RECOMMENDED POSITION

Staff recommends the following position:

- ☒ **Watch** Bill should be monitored by County Committee staff, but no action taken at this time.
- ☐ **Approve** County Committee supports the bill's concept, but will not actively work for passage.
- ☐ **Support** County Committee actively supports the bill.
- ☐ **Oppose** County Committee actively opposes the bill.
- ☐ **Disapprove** County Committee disapproves of the bill's concept, but will not actively oppose passage.

BILL NUMBER/AUTHOR: Senate Bill 248 / Newman	INTRODUCTION DATE: 01/26/23	LAST ACTIVITY/DATE: 09/01/23: Assembly Committee on Appropriations held on submission.
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DESCRIPTION OF BILL

This bill would require after April 1, 2024, a candidate for elective office to file with the Secretary of State, no later than the final filing date of a declaration of candidacy, a form to disclose the candidate's prior education and work history, and history of military service, if any.

POTENTIAL IMPACT OF BILL ON LOS ANGELES COUNTY COMMITTEE, SCHOOL DISTRICT ORGANIZATION PROCESS AND/OR LOS ANGELES COUNTY SCHOOL DISTRICTS

This could possibly reduce the number of prospective candidates running for school board elections.

RECOMMENDED POSITION

Staff recommends the following position:

- ☒ **Watch** Bill should be monitored by County Committee staff, but no action taken at this time.
- ☐ **Approve** County Committee supports the bill's concept, but will not actively work for passage.
- ☐ **Support** County Committee actively supports the bill.
- ☐ **Oppose** County Committee actively opposes the bill.
- ☐ **Disapprove** County Committee disapproves of the bill's concept, but will not actively oppose passage.

BILL NUMBER/AUTHOR: Assembly Bill 3277 / Assembly Committee on Local Government	INTRODUCTION DATE: 02/27/24	LAST ACTIVITY/DATE: 07/02/24: Signed by Governor. Chaptered by Secy of State.
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DESCRIPTION OF BILL

This bill requires LAFCO to determine the amount of property tax revenue to be exchanged by an affected local agency if the proposal includes the formation of a district and the applicant is seeking a share of the 1% ad valorem property taxes.

POTENTIAL IMPACT OF BILL ON LOS ANGELES COUNTY COMMITTEE, SCHOOL DISTRICT ORGANIZATION PROCESS AND/OR LOS ANGELES COUNTY SCHOOL DISTRICTS

Until a petition with a proposed property tax revenue exchange plan involving the formation of a new district is presented to the County Committee, it is unknown whether the districts, County Committee, and/or SBE would concur with the amount(s) designated, or deem the amount as unfairly advantaging and/or disadvantaging the affected district(s). It is also unclear whether negotiated agreements affecting district(s) allocations in the future could be adjusted by LAFCO after making its determination, given future uncertainties of property tax revenue fluctuations.

RECOMMENDED POSITION

Staff recommends the following position:

- | | |
|--|---|
| <input checked="" type="checkbox"/> Watch | Bill should be monitored by County Committee staff, but no action taken at this time. |
| <input type="checkbox"/> Approve | County Committee supports the bill's concept, but will not actively work for passage. |
| <input type="checkbox"/> Support | County Committee actively supports the bill. |
| <input type="checkbox"/> Oppose | County Committee actively opposes the bill. |
| <input type="checkbox"/> Disapprove | County Committee disapproves of the bill's concept, but will not actively oppose passage. |

AMENDMENTS REQUIRED

If staff's recommended position is based on the need for amendments to the bill language, suggested alternative language is attached.

CORRESPONDENCE REQUIRED

If staff's recommended position is based on the need for correspondence to the bill's author, the Governor or other governmental officials, a draft of suggested language is attached.

Please direct comments to Mr. Octavio Castelo, Secretary to the County Committee at (562) 922-6131.



**Los Angeles County Committee on
School District Organization**
c/o Los Angeles County Office of Education
9300 Imperial Highway, Downey, CA 90242-2890

Attachment

Summary of Los Angeles Unified School District Reorganization Proposals

August 2024

The following is a summary of school district reorganization proposals affecting the Los Angeles Unified School District (USD) that were at various stages in the school district organization process as of July 15, 2024.

PETITION TO TRANSFER TERRITORY FROM THE LOS ANGELES USD (LAUSD) TO THE PALOS VERDES PENINSULA USD (PVPUSD)

On July 10, 2019, Chadmar/Colfin Rolling Hills, LLC., submitted an owner petition to transfer five parcels of uninhabited territory from LAUSD to PVPUSD. At the September 4, 2019, regularly scheduled County Committee meeting, the petition was to be introduced to the County Committee. However, Chadmar's new counsel, David Soldani, addressed the County Committee and requested that the petition be withdrawn at that time. At the County Committee's regular meeting on March 3, 2021, Mr. Soldani provided the update that only four parcels may need to be transferred, and that the revised petition would likely be resubmitted within the next few months.

Status: Petition temporarily withdrawn, to be resubmitted
Status Date: March 3, 2021

RECENT INQUIRIES REGARDING REORGANIZATION (within the last two years)

Formation Proposals/Last Activity Date

- Inner City USD / April 2024

Transfer of Territory Proposals/Last Activity Date

- Inglewood USD to LAUSD / April 2023
- LAUSD to Palos Verdes Peninsula USD / March 2021

This document was prepared by staff to the County Committee.



**Los Angeles County Committee on
School District Organization**
c/o Los Angeles County Office of Education
9300 Imperial Highway, Downey, CA 90242-2890

Attachment

**Summary of Los Angeles County School District Reorganization Proposals
(Excluding those pertaining to Los Angeles Unified School District)**

August 2024

The following is a summary of school district reorganization proposals [excluding the Los Angeles Unified School District (LAUSD)] that are at various stages in the school district reorganization process as of July 15, 2024.

**FORMATION—MALIBU USD (CURRENTLY LIES WITHIN THE BOUNDARIES OF
THE SANTA MONICA-MALIBU USD)**

On September 1, 2017, LACOE received a petition in the form of a 2015 resolution from the City of Malibu to form a separate Malibu USD from territory within the boundaries of the existing Santa Monica-Malibu USD. The petition was introduced at the November 1, 2017 regular County Committee meeting, and at least one public hearing will be scheduled. After this local agency petition was introduced, however, the City of Malibu sent a letter requesting that the County Committee postpone the scheduling of its preliminary hearing to allow the stakeholders more time to discuss further options and details regarding the petition.

On February 28, 2018, however, the City of Malibu apprised the committee of their interest in pursuing the preliminary public hearing. Then, in April 2018, the City resolved to further investigate options before asking the County Committee to proceed. At its May 2, 2018 regular meeting, the County Committee voted to delay scheduling the preliminary public hearing until after getting an update on negotiations at its regularly scheduled meeting on September 5, 2018. On September 5, 2018, representatives from the City of Malibu and the Santa Monica-Malibu USD apprised the County Committee of their negotiations, and again at the March 6, 2019 meeting. On May 10, 2019, staff met with the district to ascertain the status of its ongoing study and analyses. The parties to the petition returned to the committee on September 4, 2019, October 2, 2019, November 6, 2019, January 8, 2020, and March 4, 2020 to provide updates on their studies.

On August 5, 2020, the school district's attorney apprised the committee that the impacts of the COVID-19 public health crisis on the school district- and on the city- had put a pause on their negotiations. On October 7, 2020, counsel for the City of Malibu said the pursuit of a legislative solution on the splitting of the parcel tax had stalled, and that on October 12, 2020, the City of Malibu would be considering hiring a third consultant to provide a new fiscal review on the

petition. On October 29, 2020, the city manager sent the city council's request that the petition be reactivated, and that the County Committee's process move forward.

At the County Committee's regularly scheduled meeting on December 2, 2020, the initial preliminary public hearing was scheduled for Saturday, April 17, 2021, pending public health concerns about the viability at that time of having an in-person public hearing. On March 3, 2021, the County Committee voted to conduct a virtual preliminary public hearing on April 17, 2021. That event was held and attended by more than 300 people. The County Committee heard testimony from the City of Malibu, the Santa Monica-Malibu USD, and both proponents and opponents of the petition. The County Committee concluded the preliminary public hearing on September 18, 2021, after which it approved moving the petition into the regular County Committee petition review process.

The County Committee held a virtual public hearing on November 10, 2021. At the County Committee's regular meeting on February 2, 2022, the City of Malibu requested that the County Committee delay further review of the petition in consideration of pending negotiations with the SMMUSD in March. At the County Committee's regular meeting on March 2, 2022, the City of Malibu apprised the County Committee that there are two meetings scheduled between the parties in March, and that a status update would be provided before the County Committee's regular meeting in April. On April 19, 2022, representatives of the City of Malibu notified staff that they are still negotiating with the SMMUSD and would like to delay hearing the petition. On February 1, 2023, staff received what the parties called a "Term Sheet" jointly from representatives of the City of Malibu, and from the SMMUSD. At County Committee regular meetings throughout 2023, representatives for the City of Malibu and the SMMUSD (attorneys Christine Wood and David Soldani) have appeared online or in-person consistently to offer commentary. Attorney Dale Larsen, representing the SMMUSD on the trustee area petition, also appears and relates it to the petition to form a Malibu USD. Attorney Wood disputed the report of comments she made at one of the recent meetings so we are reviewing all of the recent County Committee recordings from 2023 to document (in brief) when the representatives spoke and to allude generally to commentary they offered. Below is a recounting of meetings we have reviewed:

March 1, 2023, LACCSDO Meeting:

At the 55:45 mark, Soldani requested that the CC delay review of petitioners' SB 442 CVRA petition until after the unification is settled. It is unclear from the recording whether Wood attended.

April 5, 2023, LACCSDO Meeting:

At the 1:33:45 mark, Soldani stated that the parties are continuing to negotiate and are making progress. At the 1:34:49 mark, Wood spoke and "agrees with Dr. Deegan's updates," and agreed with everything Soldani had just said in his update.

May 3, 2023, LACCSDO Meeting:

At about the 24:00 mark, Dr. Deegan debriefed the phone consultation staff had conducted with Ms. Wood and Mr. Soldani, including the recommendation to revoke the current petition, since the parties' current activities and negotiations no longer comport with the former city council's 2015 original petition.

At the 26:15 mark, Wood said she concurred with Dr. Deegan's update.

At the 26:40 mark, Wood said "we have been coming to your meetings for several months now with updates on our joint negotiations," and she recapped that they had mediation sessions on 03-12-22, 04-02-22, 07-09-22, and the next one would occur on 08-08-23.

At the 29:30 mark, Wood conveyed that both sides are on the same page with their mutually shared goals.

June 7, 2023, LACCSDO Meeting:

At the 44:00 mark, Soldani read aloud a prepared statement by SMMUSD Governing Board Member Laurie Lieberman.

At the 46:47 mark, Soldani had concluded reading Lieberman's statement; he then requested that the CC lay out detailed expectations for the CVRA petition's public hearings, especially under the new procedures which the CC has never done before, and which some of the members appear to need more clarity about.

At the 52:15 mark, Dale Larson, representing the SMMUSD district in the trustee area matter, said the CVRA petition should be paused until the unification petition is resolved.

At the 1:17:50 mark, Soldani reiterated that 08-08-23 will be the next mediation between the parties.

July (Meeting Cancelled)

August (Meeting Cancelled)

September 6, 2023, LACCSDO Meeting:

At the 1:04:45 mark, Wood said the parties received an independent analysis which created a formula to monetize the Term Sheet the parties had created, and that both parties have agreed to the formula.

At the 1:06:50 mark, Soldani said he agreed to everything Wood had just conveyed to the County Committee, and that the next mediation on 10-17-23 has the goal of trying to agree to timelines and whether the City of Malibu is willing to withdraw its original petition and whether the SMMUSD would then file its own petition.

October 4, 2023 LACCSDO Meeting:

At the 1:34:35 mark, Wood said she had no updates beyond what Dr. Deegan had shared during the staff update. She said she was attending the meeting in case the CC had questions.

At the 1:35:45 mark, Wood said the parties had reached terms on a Per Pupil Funding Formula, and that they were in the process of negotiating contingency agreements for that, as well as various contingencies associated with Operational Agreements. She said that on 10-17-23, the parties would meet to try to come to further terms on many contingencies to be addressed.

At the 1:37:40 mark, Wood acknowledged that they haven't broached CEQA considerations yet, among many other issues.

At the 1:38:05 mark, Soldani said he had one "modification" to offer on Wood's updates, which is that of the three agreements (in the Term Sheet), the fiscal aspect is the most complicated, and that they believe they have come to agreement on that. The SMMUSD is hoping that the next mediation will result in the parties agreeing that the City of Malibu's petition should be withdrawn.

Nov. 1, 2023, LACCSDO Meeting:

At the 13:55 mark, Dr. Deegan gave the staff update.

At the 21:40 mark, attorney Dale Larsen (representing the SMMUSD in the trustee area petition) said the unification petition parties have made great progress, so the CVRA petition should be delayed to allow district to undertake significant public outreach about the unification petition.

At the 40:27 mark, Wood stated that the parties made substantive progress on a revenue sharing agreement, and that a JPA agreement shouldn't be difficult for the sides to achieve. They are hoping that in February 2024, the parties will ratify the agreements, but that the SMMUSD needs to do significant public outreach in January 2024 about the proposed revenue sharing agreement. They are optimistic they can have special legislation in the 2024 legislative session to help the two sides achieve the unification.

December 6, 2023 LACCSDO Meeting:

At the 1:08 mark, Dr. Deegan gave the staff update.

At the 1:10:00 mark, Ms. Wood, representing the City of Malibu in person, was called on and deferred to Mr. Soldani, representing the SMMUSD, who appeared online.

At the 1:11:30 mark, Mr. Soldani stated that the relevant parties did meet and continue to work through components of the revenue sharing agreement. He also stated that the parties to the unification petition owe the County Committee an updated timeline, reporting that the parties continue to make progress by degrees in their negotiations. Mr. Soldani clarified that the SMMUSD never threatened to withdraw from the unification process because of the work required on the trustee area petition but stated that to hold the public hearings for the trustee area petition in January 2024 would delay the unification in the special legislation process by a year. He continued that it does not make sense to review a trustee area petition on the cusp of a unification petition, which would necessarily address trustee areas.

At the 1:14:35 mark, Ms. Wood, representing the City of Malibu, stated that she would defer to Mr. Soldani and everything he said. She said the City would not be happy if the process to get special legislation started for the unification was delayed by a year, stating that the City want to move forward with the petition.

January 10, 2024 LACCSDO Meeting:

At the 44:58 mark, Dr. Deegan gave the staff update.

At the 45:43 mark, Ms. Wood, representing the City of Malibu, appeared in person along with Mr. Soldani, representing the SMMUSD. They presented their “updated aspirational timeline” for goals they had previously presented to the County Committee in a PowerPoint they referenced as the groups’ termsheet.

February (Meeting Cancelled)

March 6, 2024 LACCSDO Meeting:

At the 35:44 mark, Dr. Deegan gave the staff update.

At the 37:25 mark, Ms. Wood, representing the City of Malibu in person, was called on; Mr. Soldani was not in attendance nor appeared remotely. At the 38:16 mark, Ms. Wood said they gave a presentation to the County Committee several months ago and they have concluded all discussions and negotiations around their financial agreement. She said they are waiting for an opportunity to share that financial agreement with the community, and that they are negotiating the terms of the other two agreements. At the 47:14 mark, Ms. Wood said, “...all of the work that we’ve done in the last couple of years have been to avoid a review of the nine criteria.” Ms. Wood also stated that the CVRA activity had obstructed their ability to focus and make progress on the [City of Malibu’s] unification petition.

April (Meeting Cancelled)

May (Meeting Cancelled)

June 5, 2024 LACCSDO Meeting:

At the 35:38 mark, Dr. Deegan paused the start of the staff update as the County Committee engaged in discussion, then at the 43:50 mark sought to answer questions arising from the discussion by resuming the beginning of the staff update. At the 46:24 mark, Dr. Deegan was able to resume the staff update.

At the 53:32 mark, Ms. Wood representing the City of Malibu in person, was called on; Mr. Soldani attended online and spoke after her. She stated that Malibu has hosted several community meetings (no dates provided) for a total of eight. She stated that Malibu “had a special council meeting and a couple other community meetings, like on a Saturday, and an evening meeting, and met with all of our PTAs, and the Chamber of Commerce, and the Malibu Association of Realtors just to get feedback from the community about the terms of the Revenue Sharing Agreement.” Ms. Wood stated that they didn’t have any joint meetings, but they did use the same PowerPoint, including at the community meeting SMMUSD had at the end of May (2024).

At the 55:30 mark, Mr. Soldani began his update, and thanked the County Committee for allowing them to avoid litigating a previous version of a petition, given the willingness of both parties to

negotiate. He emphasized that this will be the most complicated unification that has ever been attempted in California, and that it is more complicated than the Wiseburn Unification petition. He stated that both districts will be Basic Aid, and there are some financial complications involved. The groups and their mediator met on Tue. June 4, 2024, and Mr. Soldani stated they plan to be largely completed by early Fall 2024. They scheduled a June 18 follow-up mediation and he stated they intend to spend July working on the other two agreements, an Operational Agreement, and a JPA, targeting August 1st through 15th as when all three agreements would be shared with everyone in the community and with the County Committee.

July (Meeting Cancelled)

In summary, representatives for both the SMMUSD and the City of Malibu (Soldani and Wood) consistently requested that the County Committee consider both the petition to add trustee areas and trustee area voting (submitted by two residents) and the petition to create a Malibu USD (submitted by the City of Malibu) as linked items given the involvement of the SMMUSD in both petitions and the challenging timelines for hearings, financial details that remain unresolved, ongoing mediation, and the prospects of special legislation. The timeline for hearing this petition remains unclear. In a November 29, 2023 letter from attorney Larsen (for the SMMUSD trustee area petition submitted by two residents) he stated that the district could not pursue the work needed to achieve unification during January and February of 2024 if it also had to attend to the trustee area petition, and, again linking the two petitions, requested that the trustee area petition not be taken up until March of 2024. At the County Committee meetings on December 6, 2023, and January 10, 2024, Kevin Shenkman, attorney for the trustee area petitioners, stated emphatically that the trustee areas petition is not linked with the petition to create a Malibu USD. On Wednesday, April 17, 2024, some County Committee staff met with some of the parties representatives for a presentation about their tentative Revenue Sharing Agreement. The parties said there are two other agreements they were working on which may be presented to the County Committee after they receive input from community meetings and outreach they are planning. Since County Committee staff were not invited to attend any of the community meetings which the City of Malibu's representatives said were being scheduled, staff visited the City of Malibu's website on May 1, 2024. The website said a community workshop would occur on May 15 at Malibu City Hall. Upon revisiting the website on May 4, it stated that the community meeting had been cancelled, and it did not mention if or when it would be rescheduled. On June 14, 2024, Mr. Soldani sent a letter with an updated timeline which was shared with the County Committee. On Thursday, July 11, 2024, Ms. Wood sent a letter requesting that the County Committee schedule a public hearing since the City of Malibu has discontinued negotiating with the SMMUSD. When a full review of the petition is agendized, staff will present a feasibility study.

Status: Possible public hearing dates being identified.
Status Date: July 15, 2024

PETITION TO TRANSFER TERRITORY FROM THE GLENDALE UNIFIED SCHOOL DISTRICT (USD) TO THE LA CANADA USD

On November 23, 2015, LACOE received a request for a petition pursuant to EC §35700, to transfer certain territory from the Glendale USD to the La Canada USD. The request was submitted by chief petitioners Ms. Nalini Lasiewicz, Mr. Thomas G. Smith, and Mr. Nick P. Karapetian. The petition was forwarded to County Counsel to determine its legal compliance regarding format and content. On January 13, 2016, County Counsel deemed the petition sufficient. Staff returned the petition to the chief petitioners on January 15, 2016.

On June 29, 2016, the chief petitioners submitted signed petitions for review. On June 30, 2016, staff conveyed the signed petitions to the Registrar-Recorder for signature verification. On July 18, 2016, staff received notice from the Registrar-Recorder that there were sufficient signatures to move the petition forward. Chief Petitioner Smith subsequently resigned from his role.

The petition was presented to the County Committee on September 7, 2016. The County Committee held two public hearings (October 26, 2016, in the La Canada USD, and November 2, 2016, in the Glendale USD). In mid-February, 2017, the two districts resumed negotiations in an attempt to find amicable solutions, but as of mid-April, were not able to resolve issues. A feasibility study was presented to the County Committee at the May 3, 2017 meeting, after which the Committee gave a preliminary approval to the proposal.

In the fall 2017, staff concluded the Request For Proposal (RFP) process, evaluated vendors, and selected an environmental consultant, for whom a contract was agreed upon. The environmental analysis concluded with the report's comment period spanning August 30 – September 18, 2018. The California Environmental Quality Act (CEQA) Public Hearing convened on October 3, 2018, at the County Committee's regular scheduled meeting. The County Committee continued to review the petition.

In February 2019, Dr. Kelly King, Interim Superintendent of the Glendale USD, requested a delay in the final review of the petition so that she could become familiar with the relevant issues following her recent appointment. Also in February 2019, the chief petitioners requested that the final review of the petition not take place at the April 3, 2019 meeting, because that date would fall during spring break and may impact participation by the public. In April 2019, the chief petitioners requested the June meeting date be changed due to coinciding with the school year ending, which could prevent some parents from attending the meeting.

At the October 2, 2019 regularly scheduled meeting, the County Committee voted to accept the CEQA findings, and conducted a final vote to approve the petition, but did not approve the election area, pending the review of different election area scenarios. At the November 6, 2019, regularly

scheduled meeting, the County Committee further discussed election area factors and requested additional election area maps to be reviewed at the January 8, 2020 meeting.

Before the County Committee could finalize the election area at the January meeting, however, Glendale USD appealed the petition's approval to the State Board of Education (SBE), and commenced litigation about the sufficiency of the CEQA process, which halted the County Committee's process. At its May 6, 2020, regular meeting, the County Committee passed a resolution to convey the petition's administrative record to the SBE.

In September of 2022, CDE/SBE notified County Committee staff that they were reviewing this appeal and preparing for SBE review. In the latter half of December 2023, the CDE issued notification that the appeal was scheduled for January 18-19, 2024. The SBE heard the appeal on January 18, 2024, denied the appeal, and selected the transfer area as the election area. The CEQA litigation was settled and the suit dismissed on March 13, 2024.

Status: Election preparations underway
Status Date: July 15, 2024

FORMATION—MALIBU USD (CURRENTLY LIES WITHIN THE BOUNDARIES OF THE SANTA MONICA-MALIBU USD)

On July 23, 2015, LACOE received a request for a petition from chief petitioner Mr. Seth Jacobson, a community member who is a Malibu resident. Mr. Jacobson, along with two other chief petitioners, wants to form a separate Malibu USD from territory within the boundaries of the existing Santa Monica-Malibu USD. Prior to the submission of any signed petitions related to this request, the City of Malibu submitted its own petition to form a Malibu USD, which was discussed earlier in this update document.

Staff reviewed the request and forwarded a draft petition to County Counsel on July 27, 2015, for a legal compliance review regarding format and content. We received notification on July 30, 2015, from County Counsel informing us that the draft petition was legally acceptable. The petition was mailed to the chief petitioner on July 31, 2015, for circulation within the petition area. Staff is informed that signatures have been gathered, but not yet presented for signature verification, as the petitioners continued to negotiate with the Santa Monica-Malibu USD. A joint committee was appointed by both the district and the City of Malibu, which released a study addressing the implications of this petition. It is not clear if negotiations with this petitioner group are ongoing.

Status: Petitioners may be in negotiation.
Status Date: March 18, 2016

FORMATION—ALTADENA USD (CURRENTLY LIES WITHIN THE BOUNDARIES OF THE PASADENA USD)

On January 17, 2006, LACOE received a request for a petition from chief petitioners Ms. Maurice Morse, Ms. Shirlee Smith, and Mr. Bruce Wasson, three community members who are residents of the area known as Altadena. The chief petitioners want to form an Altadena USD from territory within the boundaries of the Pasadena USD. The petition request was returned to the chief petitioners on January 20, 2006, because it lacked an adequate description of the area pursuant to EC §35700.3.

On February 10, 2006, LACOE received a revised request for a petition. Staff reviewed the request and forwarded a draft petition to County Counsel on February 22, 2006, for a legal compliance review regarding format and content. We received notification on March 6, 2006, from County Counsel informing us that the draft petition was legally acceptable.

On March 7, 2006, staff forwarded the draft petition to the Registrar-Recorder for verification that the description of the proposed boundaries of the Altadena USD was sufficiently clear (so registered voters residing within the proposed petition area could be identified with specificity). The Registrar-Recorder confirmed that the description was sufficient on March 10, 2006.

The petition was mailed to the chief petitioners on March 14, 2006, for circulation within the petition area. The Registrar-Recorder estimated the chief petitioners must collect approximately 7,000 valid signatures to meet the criteria set forth in EC §35700(a).

On September 23, 2010, chief petitioners delivered signed petitions to LACOE. Staff submitted the petitions to the Registrar-Recorder on September 27, 2010, for signature verification. On October 22, 2010, the Registrar-Recorder notified staff that there were insufficient valid signatures (less than the required 25 percent of the registered voters within the petition area). Staff notified the chief petitioners of the insufficiency, and at Mr. Wasson's request, returned the petitions to the Registrar-Recorder for a signature audit. Staff also advised the chief petitioner regarding the collection of additional signatures. Upon notification by the Registrar-Recorder of a sufficient number of valid signatures, staff will present the petition to the County Committee at the next regular meeting.

On January 4, 2011, staff conferred with a representative from the Registrar-Recorder's office, who informed us that no audit of petition signatures had been done yet, and they clarified the cost of signature verification. On February 15 and March 1, 2011, staff contacted the Registrar Recorder's office and were informed that the signature audit was not yet done. On May 12, 2011, staff from the Registrar Recorder's office advised LACOE that an audit of the petition's signatures was underway. On November 28, 2011, the chief petitioner, Mr. Wasson, notified LACOE of the death of one of the co-chief petitioners, Ms. Morse. Mr. Wasson stated that another chief petitioner

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would not be named. In August of 2014, staff confirmed that petitioner is still interested in collecting additional signatures.

Status: Petition insufficient; chief petitioners may gather additional signatures.
Status Date: December 5, 2011

FORMATION—MALIBU USD (CURRENTLY LIES WITHIN THE BOUNDARIES OF THE SANTA MONICA-MALIBU USD)

Status: Petition in circulation.
Status Date: February 21, 2008

FORMATION—LA MIRADA USD (CURRENTLY LIES WITHIN THE BOUNDARIES OF THE NORWALK – LA MIRADA USD)

Status: Petition in circulation.
Status Date: March 20, 2007

Unification Proposals/Last Activity Date

- Inner City USD / April 2024

Transfer of Territory Proposals/Last Activity Date

- Castaic Union SD to Saugus Union SD / November 2023
- Inglewood USD to LAUSD / April 2023
- Azusa USD to Glendora USD/October 2016

Trustee Areas and/or Governing Board Size/Last Activity Date

- Acton-Agua Dulce USD / June 2024
- El Monte City SD / March 2024
- San Marino USD / April 2022
- Walnut Valley USD / May 2016

This document was prepared by staff to the County Committee.