



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

2025 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

March 28, 2025

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

FROM: April Mitchell, Acting Secretary
County Committee

SUBJECT: Regular Meeting of the County Committee – Wednesday, April 2, 2025

The next regular meeting of the County Committee is scheduled for Wednesday, April 2, 2025, at 9:30 A.M. in the board room at the Los Angeles County Office of Education in Downey. **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 April 2, 2025.

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. 2 – Calendar Year 2025

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 PM 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
April 2, 2025
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 February 5, 2025	<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 PM 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 Mr. LaPlante Dr. Deegan Mr. Hass	An update will be provided about the Policies Subcommittee	<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. REVIEW OF A PETITION TO FORM A MALIBU USD FROM TERRITORY WITHIN THE SANTA MONICA-MALIBU USD (SMMUSD)	<i>I, D, A</i>

Speaker	Item	Notes
	Staff will provide a feasibility study to the County Committee, after which the County Committee may choose to vote on the petition.	
Ms. Solomon Mr. Castelo Ms. Cervera Dr. Deegan	B. CALIFORNIA VOTING RIGHTS ACT (CVRA) An update will be provided to the County Committee on local, state, and national activity related to CVRA.	<i>I, D, A</i>
Ms. Solomon Mr. Castelo Dr. Deegan Mr. Hass	C. 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	D. 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	E. 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	F. 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
February 5, 2025**

*County Committee
Meeting February 5, 2025*

The Los Angeles County Committee on School District Organization (County Committee) held a hybrid meeting on Wednesday, February 5, 2025. The meeting was called to order at 9:32 AM by Ms. Suzan Solomon.

Members Present

Frank Bostrom
Charles Davis (9:52 AM)
Martha Deutsch
Donald LaPlante
Ralph Mechur
Dr. Cherise Moore (9:39 AM)
John Nuñez
John Quintanilla
Barry Snell (9:47 AM)
Suzan Solomon

Staff Present

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

Item	Description																								
<i>Call to Order</i>	Ms. Suzan Solomon called the County Committee meeting to order at 9:32 AM.																								
<i>Pledge of Allegiance</i>	Mr. Frank Bostrom led the flag salute.																								
<i>Administer Oaths of Office</i>	Ms. Suzan Solomon administered Oaths of Office to Mr. John Nuñez, Mr. Donald LaPlante, and Dr. Cherise Moore.																								
<i>Roll Call</i>	<div>Roll call was conducted. Attendance is as follows:</div> <table><tr><td>Mr. Frank Bostrom</td><td>Yes</td><td>Dr. Cherise Moore</td><td>Yes</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	Yes	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	Yes																						
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>Establishment of Quorum</i>	Quorum was established.																								
<i>Ordering of the Agenda</i>	The ordering of the agenda stands. No recommendations to reorder the agenda were received.																								

Approval of Minutes of November 6, 2024	It was MOVED by Mr. Bostrom and SECONDED by Mr. Mechur. Votes are as follows:			
	Mr. Frank Bostrom	Yes	Dr. Cherise Moore	Late
	Ms. Estefany Castaneda	Absent	Mr. John Nunez	Yes
	Mr. Charles Davis	Late	Mr. John Quintanilla	Yes
	Ms. Martha Deutsch	Yes	Mr. Barry Snell	Late
	Mr. Donald LaPlante	Yes	Ms. Suzan Solomon	Yes
	Mr. Ralph Mechur	Yes		
Nominating Committee for New Officers	The Nominating Committee for new officers submitted their recommendations as follows: Suzan Solomon, Chairperson and Martha Deutsch, Vice Chairperson			
	Motion to approve nomination of Chairperson and Vice Chairperson was MOVED by Mr. Bostrom and SECONDED by Mr. Quintanilla. Votes are as follows:			
	Mr. Frank Bostrom	Yes	Dr. Cherise Moore	Yes
	Ms. Estefany Castaneda	Absent	Mr. John Nunez	Yes
	Mr. Charles Davis	Late	Mr. John Quintanilla	Yes
	Ms. Martha Deutsch	Yes	Mr. Barry Snell	Late
	Mr. Donald LaPlante	Yes	Ms. Suzan Solomon	Yes
	Mr. Ralph Mechur	Yes		
County Committee Communications	Mr. Castelo congratulated Ms. Solomon and Ms. Deutsch on their reappointments. He also congratulated Dr. Moore, Mr. Nuñez and Mr. LaPlante on their re-election to the County Committee.			
	Mr. Castelo reported that in December, an informational bulletin was sent to all K-14 districts, including community colleges and K-12 districts, announcing the election of Mr. LaPlante, Mr. Nuñez, and Dr. Moore to the County Committee. The election took place in November alongside an ethics training for board members.			
	He also expressed condolences for those affected by the recent fires in the Palisades area, emphasizing the County Office of Education’s commitment to supporting displaced students and ensuring educational continuity. The office continues to work closely with impacted charter schools and districts to provide quality service and assistance.			
Public Comments on Open Session Items	Ms. Stephanie Véniez introduced herself as a representative of the City of Malibu, working with Christine Wood. She had no comments for the committee but noted her presence in case there were any questions.			
Announcements	Mr. Castelo informed the committee that former colleague and dear friend, Mr. Frank Ogaz, is being honored with a newly renovated gym at Ledesma High School named after him. This dedication also recognizes brothers Freddy and Bernie Arteaga, whom Mr. Ogaz mentored and supported throughout their careers at the high school. The Arteaga			

	<p>brothers have received awards for their contributions to mentoring and enriching the lives of students.</p> <p>Mr. Ogaz, who served 18 years on the high school district's governing board and 27 years on the County Committee, was a driving force behind the success of many, including Mr. Ledesma, for whom the high school is named. His impact on the San Gabriel Valley and K-14 districts in Los Angeles County is deeply felt. Mr. Castelo expressed gratitude to Mr. Ogaz's family for sharing him with the Committee for 27 years and acknowledged his lasting legacy.</p>
<i>Correspondence</i>	Mr. Hass reported receiving a letter after the close of business from Mr. Craig Foster, former Malibu USD Board member. The letter was addressed to the County Committee and contained a forwarded message previously sent to the Santa Monica-Malibu USD Board of Education.
<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>	Mr. Hass reported that the bylaws are nearly complete and were sent to all 11 committee members in November for review and feedback. Members should send any suggestions directly to Mr. LaPlante, the subcommittee chair, before finalization. Once completed, the Policy Subcommittee will begin work on the more detailed policies.
<i>Recommendations</i>	None at this time.
<i>Hearings</i>	None at this time.
<i>Informational Items</i> <i>A. Update on Petition to Form a Malibu Unified School District from Territory within the Santa Monica-Malibu Unified School District</i>	<p>A. Dr. Deegan provided an update on the ongoing petition process, which has been under review for several years. A final public hearing is tentatively scheduled for February, with committee members to be consulted on availability. The feasibility study deadline was initially March 5th, but an extension was requested due to recent events, including the fires. The petition is expected to be discussed and voted on at the April meeting, likely on April 2nd or 9th.</p> <p>Dr. Deegan emphasized that unification is a state action, and the County Committee's role is to review the nine conditions and provide an advisory vote to the State Board of Education. Regardless of the committee's decision, the petition will proceed to the State Board, which will ultimately determine the outcome. The timeline for state review remains uncertain, though recent reports suggest their backlog has decreased. Additionally, an environmental impact report will be required before final approval.</p>

	<p>Dr. Deegan noted that while there is urgency within the community, the process will likely take multiple years unless state legislation is introduced. The State Board will also conduct a significant reexamination of data at the time of review due to shifting enrollment and financial figures.</p> <p>Lastly, a recent issue arose regarding the use of materials in Malibu's presentation that may be subject to evidence code prohibitions related to mediation with Santa Monica-Malibu USD. Attorneys are currently addressing this matter, and it is not expected to impact the committee's analysis. Any missing information in the review process may be due to this issue, which should be resolved before the final public hearing.</p> <p>Ms. Christine Wood extended well wishes to those affected by the fire and confirmed no new updates on the petition. There has been no official contact between the city and district, as the city is not involved in the ongoing agreement process. She is available for any questions.</p> <p>Mr. Jon Kean expressed sympathy for those affected by the fires and thanked the committee for the three-month delay. He raised concerns about the February hearing in Santa Monica and the April 9th meeting falling during spring break, which could affect attendance. He noted that consultants from both sides are still working, despite no direct communication between district board members and Malibu city council members. He thanked the committee and wished well to affected districts.</p> <p>Mr. David Soldani echoed Mr. Kean's comments, expressing appreciation for the committee's consideration in extending the timeline. He suggested moving the February hearing to March, a month before the April meeting, to allow more time for things to settle and reduce logistical challenges.</p>
<p><i>Informational Items</i></p> <p><i>B. California Voting Rights Act (CVRA)</i></p>	<p>B. Dr. Hass provided an update, noting recent activity in Central California and in Orange County. provided an update on several ongoing petitions and voting rights matters. He highlighted a petition in northern Los Angeles County involving the Acton-Agua Dulce Unified School District, which is concluding its final public hearing this month. However, the process has been delayed, as they initially planned to finalize the petition last month.</p> <p>He also shared that the California Voting Rights Act (CVRA) is garnering attention nationwide, as other states anticipate new federal administration changes. These states are considering creating their own versions of the Voting Rights Act, often modeled after California's. This shift could lead to changes in the federal Voting Rights Act of 1965, particularly through updates made with Assembly Bill 764, which impacts criteria used by</p>

	<p>school districts. If the federal law changes, the CVRA could also be modified.</p> <p>Mr. Hass also noted that there are a few controversial petitions brewing in Central California, where the situation is more contentious than in Southern California. He briefly mentioned that Redondo Beach is exploring ranked-choice voting, which might influence other districts. In this case, the city council is pushing for it, and the school district, which has already lost a legal battle over the issue, may be required to implement it if it proves successful in the city.</p>
<p><i>Informational Items</i></p> <p><i>C. Legislative Update</i></p>	<p>C. Mr. Hass provided an update Mr. Hass shared that Senate Bill 248 has stalled and will not be moving forward, so it will be removed from the agenda for the next meeting. However, a new bill, Senate Bill 226, has surfaced. This bill focuses on territory transfers, specifically for community college districts.</p> <p>He clarified that under the California Voting Rights Act (CVRA), county committees do not have authority over college districts changing their election schemes, as this falls under the Chancellor's office. However, the county committees still retain authority over territory transfers for community college districts. Senate Bill 226 seeks to modify this by granting the Board of Governors the power to initiate petitions without needing to go through a vote. Additionally, if two community college districts agree, the petition would not need to come to the county committee at all.</p> <p>This bill has sparked significant discussion, as it could lead to more frequent petition initiatives by districts themselves, without the county committee's involvement. Mr. Hass emphasized that while the bill's future is uncertain, it is important to follow its progress.</p>
<p><i>Informational Items</i></p> <p><i>D. Update on LAUSD Reorganization Proposals</i></p>	<p>D. None at this time.</p>
<p><i>Informational Items</i></p> <p><i>E. Update on Los Angeles County Reorganization Proposals Excluding Those Affecting the LAUSD</i></p>	<p>E. None at this time.</p>

<i>Follow Up</i>	<p>Dr. Deegan acknowledged that some committee members had reached out regarding mileage claims after the extended period of virtual meetings. She apologized for the delay and encouraged those with outstanding claims to contact Elizabeth and Victoria to ensure they have the necessary information for reimbursement.</p> <p>Ms. Solomon reminded those who took the Oath of Office to sign their forms as they leave and hand them to Secretary Castelo. She also advised everyone to stay alert for upcoming emails with save the date information for hearings in the Santa Monica-Malibu Unified School District.</p>																								
<i>Adjournment</i>	<p>It was MOVED by Mr. Bostrom and SECONDED by Dr. Moore to adjourn. Votes are as follows:</p> <table><tr><td>Mr. Frank Bostrom</td><td>Yes</td><td>Dr. Cherise Moore</td><td>Yes</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	Yes	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		
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Ms. Martha Deutsch	Yes	Mr. Barry Snell	Yes																						
Mr. Donald LaPlante	Yes	Ms. Suzan Solomon	Yes																						
Mr. Ralph Mechur	Yes																								



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Attachment

**LOS ANGELES COUNTY COMMITTEE ON
SCHOOL DISTRICT ORGANIZATION (COUNTY COMMITTEE)
LEGISLATIVE REVIEW – APRIL 2025**

BILL NUMBER/AUTHOR: Senate Bill 226 / Cabaldon	INTRODUCTION DATE: 01/28/25	LAST ACTIVITY/DATE: 02/05/25: Referred to Senate Education Committee
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DESCRIPTION OF BILL

This bill would authorize the board of governors to approve territory transfers between community college districts upon its own initiative or upon the filing of a petition by the district's board, or by the county committee for the county where territory would be transferred. The bill only applies to counties with at least three CCDs, and the board of governors may approve the transfer without putting the measure before voters.

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

This bill could possibly increase petition activity related to CCD territory transfer proposals, but it would be unlikely for multiple petitions to arise if the legislation goes forward as written.

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 Ms. April Mitchell, Acting Secretary to the County Committee at (562) 922-6131.



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Attachment

Summary of Los Angeles Unified School District Reorganization Proposals

April 2025

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 March 18, 2025.

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.



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Attachment

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

April 2025

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 March 18, 2025.

FORMATION – PROPOSAL TO CREATE A MALIBU UNIFIED SCHOOL DISTRICT (USD) OUT OF TERRITORY CURRENTLY 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, Wood and Soldani appeared in person and presented their "updated aspirational timeline" for goals they had previously presented to the County Committee in a PowerPoint they referenced as the two sides' term sheet.

February (Meeting Cancelled)

March 6, 2024 LACCSDO Meeting:

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

At the 37:25 mark, Wood appeared in person and was called on for an update. Soldani did not appear in person nor online. At the 38:16 mark, 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. Wood said they are waiting for an opportunity to share that financial agreement with the community, and they are negotiating terms of the other two agreements. At the 47:14 mark, 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." Wood said the CVRA activity had obstructed their ability to focus and make progress on the [City of Malibu's] unification petition.

Staff Note:

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. In a November 29, 2023 letter from Mr. Larsen (for the SMMUSD trustee area petition submitted by two residents) Larsen 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, Mr. Shenkman, acting as a representative for the trustee area petitioners, stated emphatically that the trustee areas petition was not linked with the petition to create a Malibu USD.

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, Wood appeared in person and was called on for an update and Soldani attended online and spoke after Wood. Wood stated that Malibu hosted several community meetings (no dates provided) "for a total of eight". Wood 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." Wood said 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, Soldani thanked the County Committee for allowing them to avoid litigating a previous version of a petition, given the willingness of both parties to negotiate. Soldani 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. Soldani stated, "...both districts will be Basic Aid, and there are some financial complications involved." The parties and their mediator met on Tue. June 4, 2024; Soldani stated they plan to be largely

completed by early Fall 2024. The parties scheduled a June 18 follow-up mediation and 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)

Staff Note:

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 were two other agreements they were working on which may be presented to the County Committee after they receive input from community meetings and outreach. Since County Committee staff were not invited to attend any of the community meetings which the City of Malibu's representative 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, Soldani sent a letter with an updated timeline which was shared with the County Committee. On July 11, 2024, Wood sent a letter requesting the County Committee schedule a public hearing since the City of Malibu has discontinued negotiating with the SMMUSD. On July 17, 2024, Soldani sent a letter requesting the public hearing not occur until at least November 2024 to abide by the tentative timeline the two sides had recently agreed to during mediation. Soldani indicated that if the timeline is abandoned, the school district won't be able to continue participating in negotiations. On July 19, 2024, Wood sent a follow-up letter requesting that the County Committee not wait on the parties negotiations any longer.

August 7, 2024 LACCSDO Meeting:

At the 14:18 mark, Dr. Allison Deegan gave the staff update.

At the 27:47 mark, Wood stated, "It's my understanding that as long as this committee schedules their public hearing for after November, the district will remain at the table negotiating. If the hearing is scheduled earlier than November, the district will no longer participate in mediations. So that is my understanding of the district's position as it relates to the hearing."

At the 28:42 mark, Soldani said the parties need November to finalize a viable Malibu unification package, and he asked that the County Committee's public hearing not be scheduled before November 2024.

September (Meeting Cancelled)

October (Meeting Cancelled)

November 6, 2024 LACCSDO Meeting:

At the 32:23 mark, Wood stated, "...As for the community meetings, you will see that the City of Malibu held six community meetings in April and May of this year..."

At the 34:29 mark, Wood stated, "... since the Revenue Sharing Agreement was finished, and the other two agreements are 95% complete, the district's plan was to ratify the agreements in two meetings..."

At the 35:44 mark, Wood stated, "...by that time, the City [of Malibu] had already had several meetings to explain the agreements to the union leadership and union members at several Malibu schools..."

At the 36:10 mark, Wood stated, "... and just to be fair, we understand that the entire [Santa Monica-Malibu School] board may have questions and concerns, since they [the school board] may not feel like they have been given a full briefing on the agreements..."

At the 36:42 mark, Wood stated, "...you may recall- I'm going to show you those slides- in January 2024, our mediator, herself, actually made a presentation where she indicated that this- that the models- had been stress tested for more than 18 months during the mediation process. We also, um, we also had several contingencies within the agreements that made stress testing something that we were doing throughout the process, but there was never a time where we would necessarily need to run the model based on real numbers, cuz the real numbers would come up when separation happened. Those- that's when the real numbers would run through the model, but we tested the model each fiscal year when new numbers became available."

December (Meeting Cancelled)

January (Meeting Cancelled)

February 5, 2025 LACCSDO Meeting:

At the 19:06 mark, Dr. Deegan gave the staff update.

At the 28:36 mark, Wood stated, "We don't have any substantive update; there's not been much that's happened as it relates to the petition since the last time we met. There's not been any mediation or any contact between the district and the city, officially, and we just stay in contact as the district continues to work on the agreements, but the city is not involved in that process."

At the 31:34 mark, Soldani stated, "...we are appreciative of the consideration that the committee gave to our respective communities by agreeing to extend the timeline out...", adding, "...but in that same light, I think that a February hearing is a bit dicey for the same reasons that we pushed out, that the 120-day deadline, that I think we ought to consider- we respectfully ask you consider setting the February hearing for maybe March, maybe a month before the April meeting. I hope things will be more settled by then, and logistically will be less of a burden."

Staff Note:

In October 2024, the County Committee scheduled two public hearings, one in Santa Monica on November 8 at 6:00 PM, and one in Malibu on November 13 at 6:00 PM. Two days before the first public hearing, the County Committee conducted its regular meeting on November 6, 2024, at which Wood said the City of Malibu does not want to wait for the school district to approve the three tentative agreements which the Joint Finance Committee has been working on in recent years. Wood said the City of Malibu requests that the County Committee proceed with its review process irrespective of whether negotiations resume between the City of Malibu and the Santa Monica-Malibu Unified School District. Soldani and Mr. Jon Kean [vice president of the school district's

Board of Education and a member of the Joint Finance Committee] asked that the County Committee give the school board the due diligence time its members need to review the complex agreements that would break the one school district into two new school districts. The County Committee conducted an additional public hearing on Monday, March 17, 2025, at 6:00 PM in Santa Monica to hear from additional community members before agendizing its review of the petition at its regular meeting at 9:30 AM on Wednesday, April 2, 2025. Staff will present a feasibility study, and the County Committee may render its recommendation afterward.

Status: Petition agendized for review on April 2, 2025
Status Date: March 19, 2025

PETITION TO TRANSFER TERRITORY FROM THE GLENDALE UNIFIED SCHOOL DISTRICT (USD) TO THE LA CAÑADA 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 Cañada 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 Cañada 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. The election was held on November 5, 2024, the local measure passed, the election results were determined on December 3, 2024, and officially certified on December 17, 2024.

Status: Staff is working to effectuate the changes with both school districts and agencies at the state, county, municipal, and city levels.
Status Date: March 19, 2025

FORMATION – PROPOSAL TO CREATE A MALIBU UNIFIED SCHOOL DISTRICT (USD) OUT OF TERRITORY CURRENTLY 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 - PROPOSAL TO CREATE AN ALTADENA UNIFIED SCHOOL DISTRICT (USD) OUT OF TERRITORY CURRENTLY 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 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 - PROPOSAL TO CREATE A MALIBU UNIFIED SCHOOL DISTRICT (USD) OUT OF TERRITORY CURRENTLY WITHIN THE BOUNDARIES OF THE SANTA MONICA-MALIBU USD

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

FORMATION - PROPOSAL TO CREATE A LA MIRADA UNIFIED SCHOOL DISTRICT (USD) OUT OF TERRITORY CURRENTLY 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

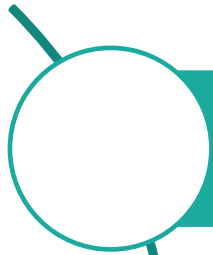
- Acton-Agua Dulce USD / June 2024
- El Monte City SD / March 2024
- San Marino USD / April 2022
- Walnut Valley USD / May 2016

This document was prepared by staff to the County Committee.

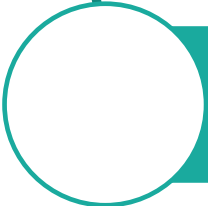


THE CITY OF MALIBU

Tonight's Speakers:



Dr. Mike Matthews, Educational Consultant, Former Superintendent, Former Malibu High Principal, Former Assistant Superintendent SM-MUSD



Cathy Dominico, Managing Partner, Capitol Public Finance Group

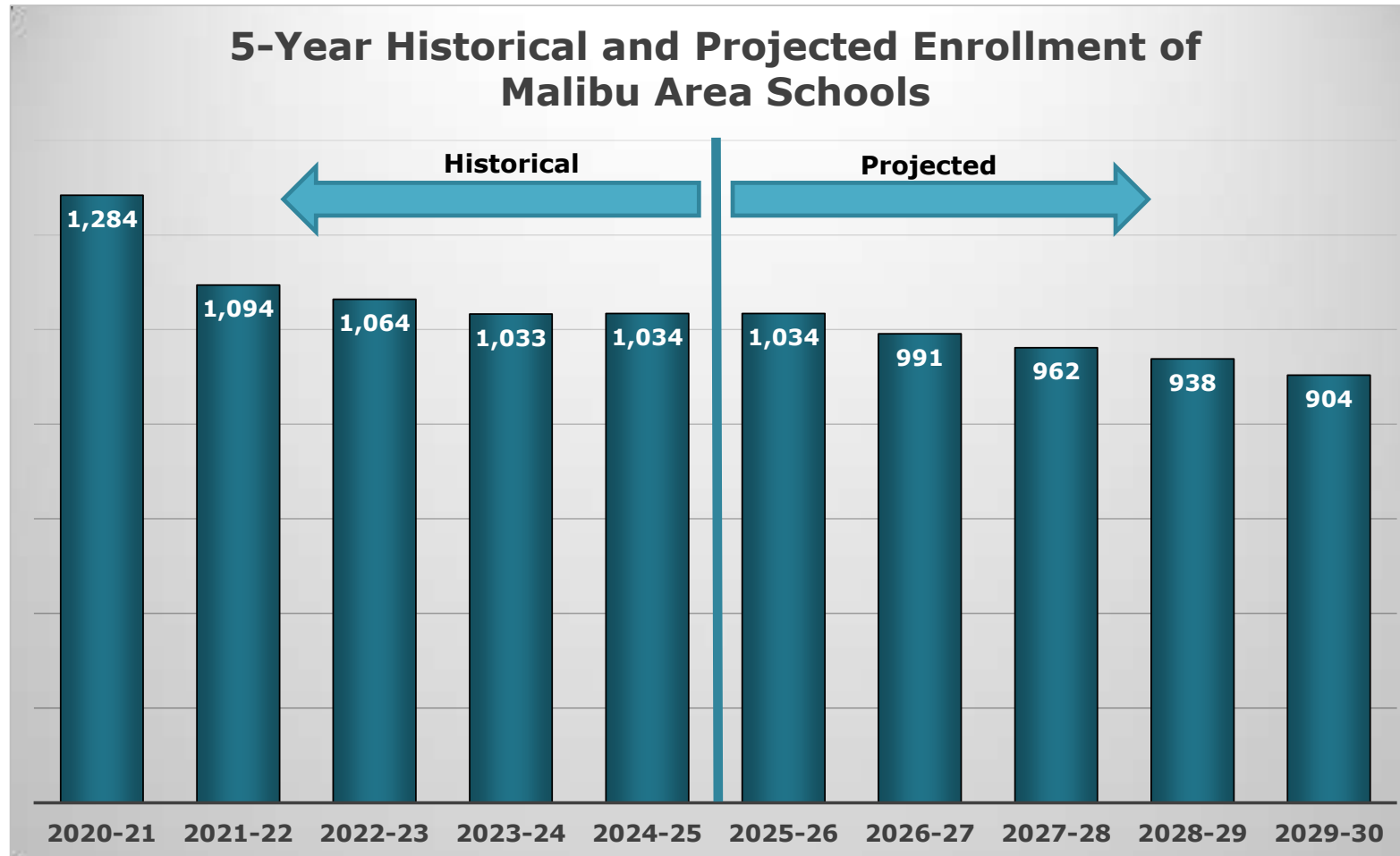


Christine Wood, Deputy City Attorney, Best Best & Krieger LLP

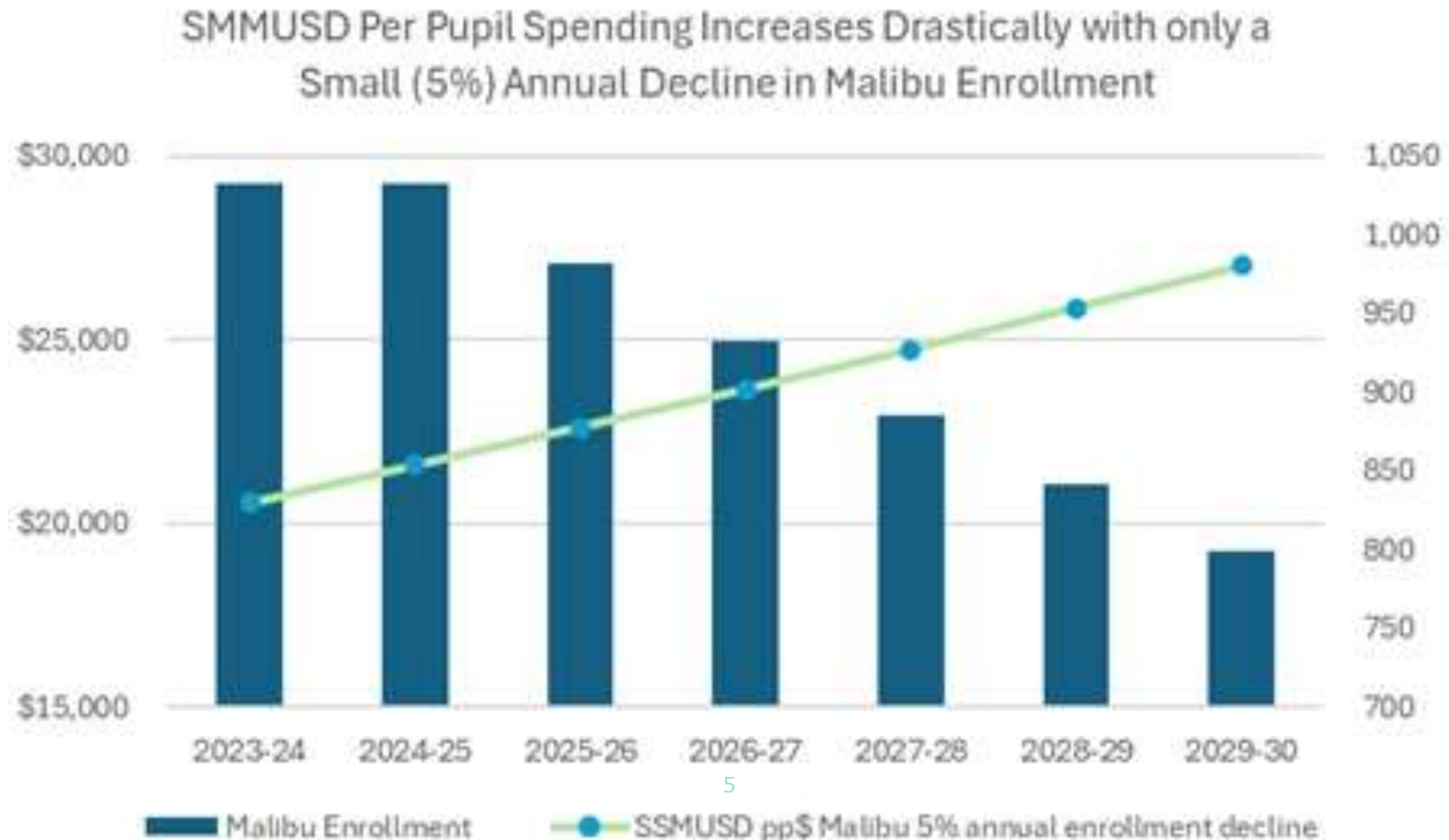
PRESENTATION OVERVIEW

- Provide key points from the Feasibility Study the City submitted to the County Committee in November 2024.
- Discussion of Criteria #1 and #9
- Demonstrate the urgency in moving forward now to form an independent Malibu USD

THE INTENT OF CRITERION #1 IS MET EVEN IF PROJECTED ENROLLMENT IS BELOW 1,500



ENROLLMENT DECLINE DOES NOT AFFECT FEASIBILITY



CRITERION #1 LEGISLATIVE INTENT IS MET

“The intent of this section is to discourage district reorganizations that result in districts that, because of small size and reduced revenues, become more dependent upon the local COE or the State for administrative support or funding.”

-School Services of California, Los Angeles County Office of Education Reorganization Feasibility Study, May 21, 2021



PROPERTY TAX ALLOCATION

The affected districts are able to negotiate an exchange of tax revenue (Revenue and Taxation Code section 99(i))

- But, if unable to do so, the County Board of Education can determine the amount of property tax revenue to be exchanged

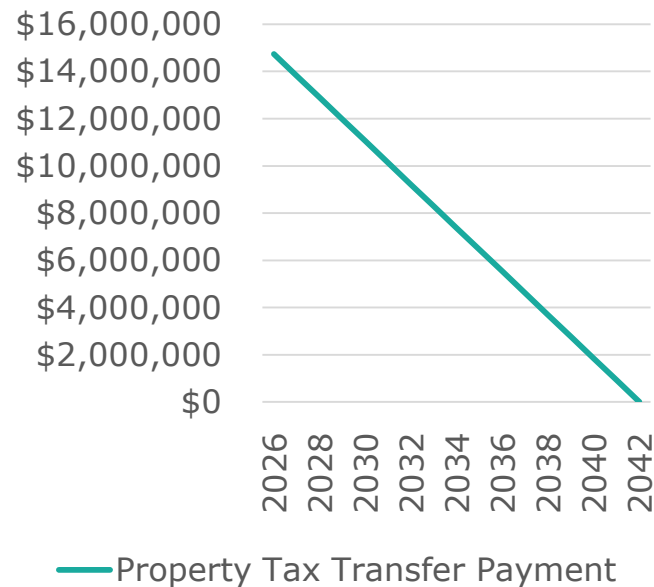
The law provides a path to allocating tax revenue in the absence of an agreement between the District and City.

- The exchange of tax revenue can be part of the Committee's recommendations related to acceptance of the petition

As described in the State Handbook, the exchange of tax revenue can be set forth as part of the petition process.

CITY OF MALIBU'S PROPOSED PROPERTY TAX EXCHANGE

Property Tax Transfer Payment



- An exchange of property taxes will provide both SMUSD and MUSD with a similar per pupil funding level as currently experienced by SM-MUSD.
- The per pupil funding amount can take into consideration the fact that Malibu students are more expensive to educate
 - Smaller school and class sizes
 - Increased transportation costs (home-to-school transportation offered)
- On an ongoing basis, to avoid a funding “cliff” for SMUSD, MUSD can taper off the payments on a straight-line basis through 2042
 - At which time the redevelopment agencies within SMUSD terminate and the District will receive additional property tax revenues

MALIBU'S PROPOSED PROPERTY TAX EXCHANGE DEMONSTRATES FISCAL SOLVENCY OF CRITERION #9

- SM-MUSD has demonstrated an ability to educate students with existing per student funding levels
 - Generated a surplus of \$26 million last year (21% of their GF unrestricted operating expenditures)
 - Even though SM-MUSD budgets show deficit spending
- If SM-MUSD can operate with a substantial surplus now, and if each separate district were to receive a similar level of per pupil funding post-separation, it is reasonable to conclude that each district would be fiscally solvent post-separation

Per Pupil Funding LA County Unified Districts 2022-23

Rank	District	Revenues	ADA	Per Pupil Funding
1	Beverly Hills	\$82,911,215	2,940	\$28,201
2	Santa Monica-Malibu	\$175,084,918	8,232	\$21,269
3	Inglewood	\$119,646,349	5,711	\$20,950
4	Los Angeles	\$6,858,814,771	347,715	\$19,725
5	Compton	\$296,870,387	15,907	\$18,663
6	Bassett	\$47,693,900	2,630	\$18,135
7	Paramount	\$211,107,152	11,752	\$17,964
8	Baldwin Park	\$170,479,867	9,599	\$17,760
9	Montebello	\$329,609,495	18,659	\$17,665
10	Azusa	\$106,712,688	6,042	\$17,662

SM-MUSD'S PER PUPIL FUNDING LEVELS ARE CURRENTLY ONE OF THE HIGHEST IN THE COUNTY, AND WILL CONTINUE TO BE SO POST-SEPARATION

AN INDEPENDENT MALIBU USD IS NEEDED NOW MORE THAN EVER

- ✓ The recent fires have created even more urgency.
- ✓ It's time to change the direction of academic achievement for Malibu students so they don't continue to fall through the cracks.
- ✓ Stop the enrollment crisis and bring students back to Malibu schools by providing academic programs that reflect the vision of the Malibu community.
- ✓ Both the Malibu and Santa Monica communities agree that separation is in the best interests of all students, there is no reason to delay.
- ✓ It simply makes sense that these two unique communities can better serve their own student populations independently with local control.





MALIBU UNIFIED NOW MORE THAN EVER



Santa Monica-Malibu Unified School District's Concerns With City of Malibu's Alternative Financial Proposal



Santa Monica-Malibu Unified School District
March 17, 2024

Presented by:

David A. Soldani, Partner / AALRR

Shin Green, Principal / Eastshore Consulting
LLC



Introduction

- The City's Alternative Financial Proposal ("City Proposal") significantly differs from the negotiated Tax Revenue Sharing Agreement (TRSA)
- District cannot support the City Proposal as currently structured
- This presentation outlines key concerns with the City Proposal

Missing Safeguards and Protections

- City Proposal removes critical safeguards present in the negotiated TRSA
- Lacks protections for Santa Monica against revenue losses
- Fails to provide operational stability mechanisms found in negotiated agreements:
 - Tax Revenue Sharing Agreement (TRSA)
 - Operational Transfer Agreement (OTA)
 - Joint Powers Agreement (JPA)

Funding Inequity

- City Proposal creates substantial funding disparities:
 - Projects Malibu USD fund balance at 123% of expenditures by 2031
 - Santa Monica USD fund balance would reach only 51% at best
 - Malibu USD (1,030 students) would be substantially overfunded
 - Santa Monica USD (7,350 students) would receive insufficient funding

Funding Stability Concerns

- City proposal relies on a temporary spike in fund balance resulting from recent stimulus funding
- Santa Monica's revenue sources include more volatile local funds
- City Proposal lacks adjustment mechanisms for revenue fluctuations
- Potential loss of \$10M+ in local funding would create compounding deficits
- Santa Monica would be unable to sustain these potential losses

Mischaracterization of District Finances

- City Proposal miscalculates and mischaracterizes current District surplus
- Treats temporary surplus (38% from disputed revenues) as ongoing structural surplus
- Reduces revenue sharing based on this flawed assumption
- Ignores impact of recently settled union contracts with retroactive raises

Per-Student Funding Concerns

- City Proposal identifies \$4,200 per-student cost differential
- Results in insufficient tax revenue transfers to Santa Monica
- Santa Monica would drop from 2nd to 5th in county per-pupil funding
- Malibu would become highest-funded district in LA County

Demographic Realities vs. City Claims

- City incorrectly attributes enrollment decline to District practices
- Actual data shows 42% decline in Malibu area birth rates over past 20 years
- Demographic trends, not District policies, drive enrollment changes
- City Proposal ignores these demographic realities

Operational Transition Issues

- City Proposal follows minimum statutory requirements - insufficient for complex transition
- Lacks detailed planning for:
 - System replication
 - Equipment allocation
 - Personnel transition
 - IT implementation (requires 1+ year planning)

Enrollment Flexibility Concerns

- City Proposal lacks mechanisms to handle temporary enrollment shifts
- Without TRSA protections, Santa Monica would bear full costs of temporary accommodations
- No guaranteed commitments for Inter-District Transfers (IDTs) or siblings

Conclusion

- The negotiated TRSA contains essential safeguards developed over two years
- TRSA designed to ensure equitable, stable funding growth for both entities
- City Proposal advantages Malibu USD at the expense of Santa Monica students
- We cannot support the City Proposal and recommend returning to the negotiated agreements

Thank You

For questions or comments, please contact:

David A. Soldani
(559) 225-6700
dsoldani@aalrr.com

Shin Green
(510) 725-2930
shin@eastshoreconsulting.com

aa/rr

Atkinson, Andelson
Loya, Ruud & Romo
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EASTSHORE CONSULTING

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Enclosed are Public Comments
received up until 8:00 AM
Friday, March 14, 2025.

They pertain to the County
Committee's Public Hearing at
6:00 PM, March 17, 2025, at
the Santa Monica College
Main Campus.

From: Jessica Mark <jpyne@me.com>

Sent: Wednesday, March 12, 2025 9:31:57 PM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: SMMUSD MALIBU SEPERATION

Hello SMMUSD committee. My name is Jessica Mark and I have 2 kids in Malibu Elementry School. I also have a step son who graduated from Malibu High School.

This is on the eve of yet another school closure (Thursday) following a half day (Wednesday) and likely a Friday closure also. My kids have missed a month of school this year and it seems that the committee, largely made up of Santa Monica residents, has not visited our school.

There is a glaring physical separation which should warrant a separation much like the palisades is separated and they are in between! Yet SMMUSD is still unwilling to finalize this separation. This is grossly unfair and Santa Monica residents are completely out of touch! If Malibu had its own district these closures would not of happened. We could hire teachers whose commute was reasonable. There has been ingress and egress in Malibu this entire winter for Malibu excluding where the fire happened. We already lived through the Woosley fire and the mud slides and this winter is not as bad as that, and 3 of the 4 schools were not in the 2024 or 2025 fire areas. One school (which has also been safe) should not shut down 3 other schools. The bottom line is that Malibu needs to be able to make decisions that are best for Malibu. A city (Santa Monica) based community that is completely out of touch with our beach rural community should not be making decisions on how we run our school district. I am not sure how this is even legal? This is just cause for seperation.

Jessica Mark

From: Marielle Hadid <marielle.hadid@gmail.com>
Sent: Thursday, March 13, 2025 9:34 AM
To: Mitchell_April <Mitchell_April@laoe.edu>
Cc: Hertz, Christopher <chertz@smmusd.org>
Subject: Malibu schools

Dear Ms. Mitchell,

I am a parent of two children, one at MES and one at MMS. As a PTA board member and concerned parent, I am particularly distressed about the missed school days this year. I have already discussed potential solutions with Dr. Shelton regarding late school openings. Additionally, I have expressed concerns about the lack of power and safety at our schools.

I firmly believe that Malibu should have autonomy in making decisions regarding school openings and safety. Furthermore, it is crucial to equip our schools to meet the specific needs of our community. In my opinion, Santa Monica Malibu USD has fallen short in providing the best possible education for our students. As well as the necessary support for teachers, administrators, and parents.

Another important issue is the control over our enrollment. While it is important to support other schools during challenging times, my son's class, which started with 25 students and now has 30, we are fortunate to have been able to subsidize these large class sizes through fundraising for teacher's aides in the classroom. However, this funding was provided by the Malibu PTA, not the school board.

It is time for Santa Monica USD to release Malibu from its control and allow us to establish our own school district, which can make the most informed decisions for the well-being of our community.

Kind regards,

Marielle Hadid

c 310.592.9258

Mariellehadid@gmail.com

From: james webster <jameswebster2@gmail.com>

Sent: Thursday, March 13, 2025 9:45 AM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: Malibu School crisis

Good morning –

Ahead of the hearing today I want to set forth very personal concerns about the crisis that is so deeply affecting my daughter Bianca's educational journey.

She is 9 years old but has experienced seemingly unending school closures at Malibu Elementary where she is in 3rd grade.

Out of great concern and love for our daughter, and doing everything we can while remaining in our community during this fire driven crisis, I reiterate that this is a time please for the separation of a Malibu School District to be realized.

I know there are many arguments about funding, remote management, and the apparent mismatch of goals between Santa Monica and our community. I will not repeat them here as I'm sure you are fully conversant with those arguments by now.

I do wish however to submit in the strongest terms that our community is struggling, and this crisis has revealed fully that we must in future have stewardship over our school community, and meet the needs of our children in a stand alone manner.

Please allow us to avoid school closures (we have yet another one today) and let us stem the loss of families from our neighborhood. Many have lost faith in the ability of the local schools to deliver, yet the committed staff and education professionals are doing all they can to be there for our children. Please allow us to come together and create a Malibu School District that will meet our children's needs after the catastrophe that has truly separated us from Santa Monica.

We are grateful for your close consideration and support for this outcome, the time for which has truly arrived.

Thank you James Webster
Father of Bianca (9) and Electra (4)
310 279 2287

From: Amy Grimes <amygrimes521@gmail.com>
Sent: Thursday, March 13, 2025 9:52 AM
To: Mitchell_April <Mitchell_April@laoe.edu>
Subject: Urgent: Support for Malibu School District Separation

Dear Ms. Mitchell,

I am writing to express my strong support for Malibu's separation from Santa Monica-Malibu Unified School District (SM-MUSD). The need for an independent Malibu school district has never been more urgent, and the challenges we have faced in recent years highlight why this separation is essential for the well-being of our students, families, and educators.

Malibu has endured repeated school closures, power outages, and natural disasters, with little to no proactive response from SM-MUSD. The recent Palisades Fire, combined with ongoing disruptions since November 2024, has resulted in significant lost learning time for our students. Despite these ongoing issues, there has been no clear plan for remote learning or academic recovery. Teachers are doing their best under impossible circumstances, but without a district that prioritizes Malibu's unique needs, students will continue to suffer.

Additionally, enrollment in Malibu schools has declined as families move away due to safety concerns and lack of district support. The current one-size-fits-all approach does not work for our community, especially when geographic barriers such as fires, mudslides, and road closures separate Malibu from Santa Monica leadership. Malibu needs a district that can respond directly to its own challenges rather than being an afterthought in a larger system.

Financially, Malibu has long contributed significantly to SM-MUSD, yet our concerns have been ignored. The proposed revenue-sharing model is fair and ensures that Santa Monica schools remain financially stable while allowing Malibu to manage its own educational future. This is not about taking resources away from Santa Monica; it is about ensuring both communities can thrive independently.

At its core, this issue is about local control. Malibu's students deserve leadership that is present, engaged, and dedicated solely to their success. It is clear that remaining under SM-MUSD is no longer a viable option for our community. We must move forward with an independent Malibu Unified School District to ensure a sustainable future for our students.

I urge the County Commission to approve Malibu's separation so that we can take responsibility for our own schools and provide our children with the education they deserve. Thank you for your time and consideration.

Best regards,

Amy Webster

amygrimes521@gmail.com

From: Marc Provissiero <marc@op-ent.com>
Sent: Thursday, March 13, 2025 9:55 AM
To: Mitchell_April <Mitchell_April@laoe.edu>
Subject: Malibu School District - student wellness.

Hi Education members.

Our daughter goes to MES. Well not today. She is registered at MES. She has missed over a month of school. Some of it for reason. Up to 10 days, or two weeks due to negligence.

When you don't have mastery of a situation, it's necessary to reduce to the lowest denominator, to mitigate your exposure to risk. The school district board members live in Santa Monica. We live in Malibu. Their choices to ignore, in advance the highly predictable proclivities of life in Malibu, and take measures **in advance**, (years in advance) is mounting into clear damages. There are mudslides. There are fires sometimes, and other events. None of this is new. Several schools in Malibu were open today. The fully operational preschool, Wagon Wheel has been open all week, as just one example. Yours were not.

We don't need a governing school board to rule when things are easy. We need a body to represent us when issues arise. You will never be proactive in ensuring that Malibu children are in school, safely, the maximum number of days. On this, after the past two months, everyone agrees.

You are my representatives. It is time to shine the light on the process. I have a right to know who specifically blocked the finalized deal to separate Santa Monica from Malibu.

I, and the other parents of students you are failing, have a right to hear from that person or persons. We don't expect to hear a good answer for this intransigence. But we have a right to hear this person look us in the eye and tell us why they think Malibu children get a better education pegged to another city that is separated by a closed artery. Why our representatives, even when they try to hold a meeting in our city, literally can't. It is moved to Santa Monica. And for good reason! You can't get here. You will never do the right thing for us, even those of you who want to.

The decaying, broken and completely unnecessary illogical association of Santa Monica to Malibu school district should've ended 10 years ago. Please support what's best for children. Please separate Santa Monica from Malibu. So that Santa Monica students and Malibu student students can actually receive the best version of a Public education.

Sincerely,

Marc Provissiero

From: Annie Conte <annieconte1@gmail.com>

Sent: Thursday, March 13, 2025 9:59 AM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: Please Seperate!

Greetings-

As a life long resident of Malibu who is now raising her family here I urge you to push for Malibu having its own school system.

The separation needs to be in place so we can be sure to have school in session and make decisions for our school based on our community.

Please!

Thank you-

Annie Conte

From: Robert Edie <robert@pchestates.com>

Sent: Thursday, March 13, 2025 10:00 AM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: Please make the right decision Commissioners.

Ms. Mitchell.

I'm writing to you today on behalf of my family and my community to emphasize the once important, and now crucial, formation of a separate Malibu school district. As a 28 year Malibu resident I went to school at Malibu High School from 1997-2002. As a student, the issues created with a combined school district were less obvious, but looking back on my experience as an adult, it is clear to identify so many of the administrative shortcomings and how they directly trickled down into the academic and social experiences of the student body.

Now, a father of two children, 3 and 5 years old, it saddens me to say that I don't feel confident in the SM-MUSD school system. I don't want my kids to be subjected to the same experiences I was. I don't trust the decision makers when their interests don't align with the well being of our communities children.

Robert Lawrence Edie

Broker Associate at Compass, Inc.

p. (310) 717.1795 | f. (310) 589-0506 | Robert@pchestates.com
www.robertedie.com | Bre LIC: 01821992

From: John Littlechild <johnlittlechild@icloud.com>

Sent: Thursday, March 13, 2025 10:30 AM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: Malibu School separation from Santa Monica

As grandparents of two students attending Malibu Elementary School I must ask you to separate the Malibu School District from the Santa Monica School District.

It is just not working as it is. There is no recognition or understanding of the needs of Malibu students within the current Santa Monica/ Malibu school district. The current organization is dominated by the Santa Monica representatives and they continue to make decisions that harm Malibu students.

The list is long but top of the list is the extreme number of days the Malibu schools have been closed and the ongoing school closures for NO reason. Today the Malibu Elementary Schools are closed. Why ? Because there was rain last night. Good heavens we are in Winter - it rains in Malibu!! There was No reason for all these school closures.

Some is self inflicted - Santa Monica has not seen fit to provide back up power to Malibu Schools. Do not say it is a budget issue - it is demonstrably not as the Parents have offered to pay.

The decision to close the Malibu Schools because of bussing difficulties from Santa Monica is also nonsensical - the elementary and middle schools do not bus students!!!

Only a small handful of students are affected and the schools are closed!

We have to get back to making common sense decisions. If we don't, as the fires have demonstrated, we end up with complete disasters.

Let's not make the Malibu Schools a disaster - which they will be if they continue to be managed - very badly - from Santa Monica

Sincerely

John Littlechild

Malibu Resident

Grandparent of Malibu School students

From: Karmel A <karmel@coffice.com>
Sent: Thursday, March 13, 2025 10:47 AM
To: Mitchell_April <Mitchell_April@laoe.edu>
Cc: David Allison <david@nikoftime.com>
Subject: Malibu Schools need to be able to self-manage

Dear April,

I am forwarding one of many threads I have in my inbox surrounding our attempt to ensure our three children, in third and fifth grade at Malibu Elementary and one waiting in the wings for Kindergarten, are receiving an adequate education.

We have been begging the district and the school board for months to communicate plans earlier than the night before, to have backup plans for when winds are high or roads are closed, but it is like pulling teeth to get them to even send us emails, much less to fund necessary improvements.

This is not surprising; we are a small fraction of the students that the Santa Monica school district needs to care for, and we have unique needs that they do not understand. Many times, I have been taken aback by how little Dr. Shelton and others understand of the Malibu ecosystem— but of course why should they; they don't live here and don't need to understand the intricate relationship between wind and fire and power and landslides at our schools.

We are once again without school today, even though the sky is blue and we're all here, and everyone's healthy, and most of the teachers can make it in.

My son is in honor band, and he has spent as much as six hours in a single day commuting to Santa Monica so he can practice for the upcoming concert. It just doesn't make sense; especially now with PCH closed, Santa Monica is a 1.5 to 2.5 hour drive from us.

We are not the same city, climate, geography, or demographics. We can continue to argue and fight about who gets what and when this can happen, but it is our children and their education that are suffering. If the situation doesn't improve, we will be forced to make different decisions about where we enroll our children to protect them from the political nonsense of their elders.

Thank you for your consideration in this matter,

Karmel Allison

858-353-8390

Begin forwarded message:

From: "Shelton, Antonio" <ashelton@smmusd.org>

Subject: Re: We need a plan for long-term road closures

Date: January 30, 2025 at 8:20:07 AM PST

To: Karmel A <karmel@coffice.com>

Cc: David Allison <david@nikoftime.com>, "Kean, Jon" <jkean@smmusd.org>, "Leon-Vazquez, Maria" <mlvazquez@smmusd.org>, "Smith, Jennifer" <jsmith@smmusd.org>, "Lieberman, Laurie" <llieberman@smmusd.org>, "Mignano, Alicia" <amignano@smmusd.org>, "Rouse, Stacy" <srouse@smmusd.org>, "Tahvildaran-Jesswein, Richard" <rtahvildaranjesswein@smmusd.org>, "Burgess, Isaac" <iburgess@smmusd.org>

Good morning!

It is my hope that the plan will be completed this week, therefore allowing us the option. We need a canyon to be open to ensure that a bus can travel through. PCH is great, but we also need to be able to get to kids who have been displaced and currently live east of the canyons. As mentioned before, that canyon cannot be Kanan Rd. We will discuss further with the team requirements that must be met with the anticipation of rain, which is something that we have discussed.

We will communicate with families.

Sincerely,

Antonio

From: Karmel A <karmel@coffice.com>

Date: Wednesday, January 29, 2025 at 3:41 PM

To: Shelton, Antonio <ashelton@smmusd.org>

Cc: David Allison <david@nikoftime.com>, Kean, Jon <jkean@smmusd.org>, Leon-Vazquez, Maria <mlvazquez@smmusd.org>, Smith, Jennifer <jsmith@smmusd.org>, Lieberman, Laurie <llieberman@smmusd.org>, Mignano, Alicia <amignano@smmusd.org>, Rouse, Stacy <srouse@smmusd.org>, Tahvildaran-Jesswein, Richard <rtahvildaranjesswein@smmusd.org>

Subject: Re: We need a plan for long-term road closures

Hi Antonio,

Online is better than nothing— though does the fact that the buses can pass through on PCH change anything?

There is supposed to be **an inch of rain next Wednesday** in Point Dume; will we be ready by then? Is somebody already in contact with the sheriffs and the city so that we can hear whether there will be road or school closures as early as possible?

Thank you for your continued attention and help in these matters,

Karmel

On Jan 27, 2025, at 4:43 PM, Shelton, Antonio <ashelton@smmusd.org> wrote:

Hello!

We are meeting with our bargaining unit tomorrow to solidify a plan in the case that this happens. The MOU will solidify details that would provide instruction on zoom if we are out of school. The substitutes must have access as well, and I am not certain that we would have enough. Having only two roads as a means of access becomes a very difficult challenge, especially when we cannot have a school bus travel Kanan in the case of an emergency. Our district busses are not allowed on this road, giving us only one exit or entry to point to Malibu. We have the resources for distance learning and will use those resources if we have continued weather complications.

Sincerely,

Antonio

From: Karmel A <karmel@coffice.com>

Date: Sunday, January 26, 2025 at 8:52 PM

To: Shelton, Antonio <ashelton@smmusd.org>

Cc: David Allison <david@nikoftime.com>, Kean, Jon <jkean@smmusd.org>, Leon-Vazquez, Maria <mlvazquez@smmusd.org>, Smith, Jennifer <jsmith@smmusd.org>, Lieberman, Laurie <llieberman@smmusd.org>, Mignano, Alicia <amignano@smmusd.org>, Rouse, Stacy <srouse@smmusd.org>, Tahvildaran-Jesswein, Richard <rtahvildaranjesswein@smmusd.org>

Subject: We need a plan for long-term road closures

Hi Dr. Shelton,

There has already been 0.5" - 1" of rain across Malibu and the Palisades.

Do we have a plan for what happens if there are landslides, and roads around Malibu stay closed for weeks at a time? If it doesn't happen this week, it might with the next rain. Can we have a clear plan for parents in place earlier than the night before?

Can we bring in substitutes to cover teachers who can't drive in? Can we leverage state resources for distance learning? There are so many better options than, "Whoops, no school tomorrow again."

Thanks,

Karmel Allison

On Jan 26, 2025, at 6:42 PM, Santa Monica-Malibu Unified School District via Aeries Communications <donotreply+76aba17a-08cf-5d0f-bd8a-b4c6dff09e37@parentsquare.com> wrote:

Santa Monica-Malibu Unified School District

Malibu Schools Will Be Closed Monday, Jan. 27, 2025

Dear Malibu Parents, Guardians, Staff and Community Members,

Malibu schools will be closed Monday, Jan. 27, 2025, due to dangerous road conditions and challenges with access to our schools.

This includes Webster Elementary, Malibu Elementary, Malibu Middle and Malibu High schools.

We are as disappointed as you are in this outcome following our discussions with local partners today.

We have been in communication with the City of Malibu, the Lost Hills Sheriff's Captain, Supervisor Lindsay Horvath's office and the Los Angeles County Public Works Department, throughout the day and based on their updates and warnings regarding roads, and mudflow issues and continued rain, the decision was made to close schools tomorrow with the safety of students and staff as our top priority.

Parents and staff will hear from their Principals with information regarding the continuity of learning to best engage our students while school is closed.

We continue to monitor the situation and will communicate with you again on Monday regarding plans for Tuesday.

Thank you for your understanding and continued support of our safety-based decisions.

Sincerely,

Dr. Antonio Shelton, Superintendent

Mr. Isaac Burgess, Executive Director, Malibu Pathway & Secondary Schools

From: Rob Eloff <rob@nvtbl.io>

Sent: Thursday, March 13, 2025 10:48 AM

To: Mitchell_April <Mitchell_April@laoe.edu>

Cc: Nicole Ross <nicolesross@gmail.com>

Subject: Urgent Support for Malibu District Separation prior to legal action

Dear Education leaders,

We are writing yet again to express our utter frustration and strong support for the separation of the Malibu Schools District from the Santa Monica Malibu Unified Schools District (SMMUSD). The current arrangement has proven to be detrimental to the education and well-being of Malibu students, and it is imperative that we take action to establish an independent Malibu Unified School District. We have [attempted civil and courteous engagement](#) on this issue over the past 24 months and have only experienced delays and stonewalling from SMMUSD, the superintendent and decision makers. We are left with no choice but to consider legal action on grounds of negligence, breach of duty and breach of contract.

Our children have missed over 1 month of school this year of which we calculate two weeks have been completely avoidable. In comparison, local educational institutions like Wagon Wheel School have offered uninterrupted school service aside from essential evacuations related to the fires, and have managed to return to school seamlessly as quickly as possible. We live in the ironic situation where 2-5 year olds are able to go to school but 5-18 year olds are not when it rains. Trying to explain this to educators nationwide and to our children is embarrassing and unfair.

Over the past two years, Malibu schools have faced [numerous closures](#) due to road closures and weather disruptions which could have been entirely avoided by the local community who are able to reach our schools. In 2024 and 2025 alone, there have been multiple instances where schools were forced to close, leaving students without access to education based on the transport requirements of a small number of students and teachers that aren't based in the area.

We are also suffering from a lack of transparency. When we tried to engage with the superintendent to understand how many teachers and students were in fact affected by road closures or how decision making was being undertaken we received no clarity.

These closures are a direct result of Malibu's dependence on oversight from Santa Monica for transport and teachers. The geographical isolation and self-reliance of the Malibu community make it clear that we need a localized approach to education that addresses our unique challenges. In short, many are suffering at the attempt to accommodate the few.

Malibu students are suffering due to the incompetence of the district board in ensuring continued service delivery. Failures in communications equipment, electrical generators, and other essential services have led to significant disruptions in the education of our children. Additionally, Santa Monica's objective of giving Santa Monica-based students and teachers access to Malibu schooling has come at the expense of Malibu students, further exacerbating the issue.

Despite multiple attempts at civil engagement and negotiations, the district board has failed to address our concerns adequately. Malibu has provided an [adequate and equitable financing plan](#) to ensure a [smooth transition](#) to an independent school district. This plan guarantees that both Malibu and Santa Monica students will continue to receive a high-quality education without any financial shortfalls.

It is time for Malibu to take control of its educational future and provide our students with the stable, uninterrupted education they deserve. I urge you to support the separation of the Malibu Schools District from SMMUSD and help us create a better educational environment for our children.

Please do what is just and take action. A failure to do so is leading to the disintegration of a community.

Sincerely,

Nicole and Rob Eloff, parents of 3 children enrolled at Malibu Elementary

Best regards

--Director

646-918-0661

www.nvtbl.io

From: Maja Primorac <maja.primorac@gmail.com>

Sent: Thursday, March 13, 2025 11:20 AM

To: Mitchell_April <Mitchell_April@laoe.edu>

Cc: Kelsey McKinnon <KELSEY.MCKINNON@gmail.com>; Mark DiPaola <mark@d3ventures.com>; Pavel Lerner <pavellerner@gmail.com>

Subject: A case for an independent Malibu Unified School District

Dear Ms. Mitchell,

I hope this email finds you well. Unfortunately, I am unable to attend the upcoming meeting due to a medical issue, and I hope you will be able to read and consider my plea.

I am writing to request that you work with Malibu to approve the creation of an independent school district. The current structure of Santa Monica / Malibu Unified School District (SMMUSD) is not effectively meeting the needs of Malibu students, and I feel it is critical for our community to have more local control over our educational system.

I have three children, two of whom, Kyle and Lea, currently attend Malibu Elementary School, and I plan to enroll my third, Penelope, there next year... unless we decide to homeschool.

Since the school closures and the district's inadequate or non-existent response to concerns about future management—particularly regarding power shutdowns and road closures—my husband and I have been exploring other educational options. We've toured several private schools, and though we have more tours scheduled after my recovery, due to logistical challenges (our preferred schools are located 45 minutes away from our home), we are leaning toward homeschooling. However, homeschooling would be a last resort, as we strongly desire my children to benefit from the public education system.

When we were first deciding on an educational track for our kids, I personally was a strong proponent of public education. As a product of California's public school system, I have fond memories of the quality education I received and deeply respect the effort teachers put into their classrooms. However, since the shutdowns, I've seen a noticeable decline in my children's progress. Every time a school closes, they lose valuable momentum. For example, my first grader, Kyle, in January of 2025 he scored in the 60th percentile on the STAR assessment, which is a significant drop from the 80th percentile in the spring of 2024.

Our teachers work hard, and each one has an aide funded by our PTA, therefore no child should experience such a drastic decline in performance. The district offered summer school to address the loss of instruction, but many parents, including myself, feel that summer school is more of a punishment than a remedy. When I proposed this to Kyle, he asked why he would go. He stated that he did not do anything wrong. Correct, he did not do anything wrong and so we are currently supplementing with three additional hours of in-person tutoring. District offered

on-line tutoring, but, for our family, we find any online support for young children will not be as effective as in-person. Malibu parents have also requested that the district extend Fridays to full days of instruction, but these requests have been continuously ignored. Parents have proposed numerous solutions to address these issues, including providing nearby hotel accommodations for teachers during road closures and hiring substitutes from Malibu, Agoura Hills, or Thousand Oaks. Unfortunately, these suggestions do not seem to be considered. If these are considered, the District has not communicated with us.

Additionally, it remains unclear whether our backup power systems are fully prepared to ensure communication and maintain instructional continuity during any emergency. While Malibu Elementary School parents and the local community have provided infrastructure to support power shutdowns and communications, it seems that SMMUSD has not taken timely action or has chosen not to act on these concerns.

In light of these ongoing issues, it has become clear that SMMUSD does not have the knowledge and understanding of our community nor the necessary resources or infrastructure to meet the needs of Malibu students in an effective and timely manner. I do not want to pull my children out of Malibu Elementary, therefore I urge you to seriously consider approving the separation of Malibu from Santa Monica and the formation of an independent school district. This would allow our community to make the necessary adjustments to ensure a safe and effective learning environment for our children.

Thank you for your time and consideration.

Sincerely,

Maja Primorac, Ph.D.

(626) 524-4333

From: lily harfouche <lily@lilyharfouche.com>

Sent: Thursday, March 13, 2025 11:37 AM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: Hi

I am writing you to share my complete and total support for a separation from the Santa Monica school district from Malibu.

My eldest child is now going to college, and I have been a proponent for this separation from when he started preschool. I have three others also in the public school system.

It really is what is best for our children, and after all that needs to be our collective guiding force. Politics aside, this is about education and empowering our children. Educating, supporting, and nurturing our children in the most effective, kindest and smartest way. Santa Monica and Malibu have very little in common as far as cities go. This is not something that is up for debate, it is absolute common knowledge.

I'm not sure why this fight has been so arduous and so long. It clearly has had nothing to do with what is best for the children in either city. It really is time to put politics aside and make the right choice. I implore you to do so.

I assure you, Malibu parents will not stop fighting. We have done so for decades and will continue to until the right decision is made.

Thank you

COMPASS

Lily Harfouche

Founding Partner| Director of Estates

Malibu | California

www.compass.com/compass-cares

o: 3102032641

From: Kelsey McKinnon <kelsey.mckinnon@gmail.com>

Sent: Thursday, March 13, 2025 12:00 PM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: Donfeld comment for district separation hearing

Please share my comments below with the County Commission regarding the Final District Separation Hearing:

Dear Ms. Mitchell,

As the PTA President at Malibu Elementary School, I continue to be deeply frustrated by the District's mismanagement and lack of support for our students and am seriously considering pulling my children out of the public school system unless separation from the district occurs. Today—a bright and sunny day in Malibu—marks the 20th day our students have been shut out of school this year. The current crisis following the Palisades Fire has only underscored what has been obvious for years—that the distance between Malibu and Santa Monica's administration leaves our students at a huge disadvantage because Santa Monica does not understand or prioritize the unique needs of our community.

The inability of Santa Monica-based leadership to effectively manage the needs of both communities has been made painfully clear amid road closures, fires, mudslides, and wind events. Malibu schools are left without timely decision-making or resources when we need them most. This tragic reality proves that a unified district with such geographic separation simply does not work. Malibu must have local control over its schools to ensure the safety, stability, and continuity of our children's education.

I urge you to take immediate action to separate Malibu from the Santa Monica-Malibu Unified School District. Our children's education and well-being should not continue to suffer due to an administrative structure that fails to serve them.

Sincerely,

Kelsey McKinnon Donfeld (current PTA President, Malibu Elementary School) and Josh Donfeld (former PTA President, Malibu Elementary School)

From: Amie Moore <amiebellemoore@gmail.com>

Sent: Thursday, March 13, 2025 12:10 PM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: School district separation

To whom it may concern,

My family attends Malibu Elementary School and this year we have missed over 30 days of school. The excuses for closing our schools have varied, changed last minute, not been explained, etc etc etc. I have written numerous emails to Antonio Shelton all of which have gone unanswered.

The time to separate our districts is now. The Santa Monica school board is not capable of making decisions for our Malibu schools. They rely heavily on our tax base and therefore don't want to allow us to become our own district but our children are suffering the consequences. It is imperative we put our students, our families and our community first as the issues with PCH and natural disasters are only going to continue if not worsen.

Amie Moore

From: Emily R. Thompson <emilyrreynolds@yahoo.com>
Sent: Thursday, March 13, 2025 12:18 PM
To: Mitchell_April <Mitchell_April@laoe.edu>
Subject: Urgent: Support for Malibu's Independent School District

Dear Ms. Mitchell,

I am writing to express my strong support for Malibu's separation from Santa Monica to form an independent school district. The challenges facing Malibu schools—exacerbated by the Palisades Fire, school closures, power shutoffs, and the inability of SM-MUSD to effectively manage both communities—demonstrate the urgent need for local control.

Malibu families are losing faith in a system that does not prioritize their unique challenges. With no clear plan to address learning disruptions or power-related closures, enrollment continues to decline. The current district structure is not sustainable, and a separate Malibu USD would allow for a more responsive, community-driven approach to education.

Additionally, the proposed revenue-sharing model ensures that Santa Monica schools remain financially stable while giving Malibu the ability to make decisions that best serve its students. This is not about taking resources away but about ensuring both communities thrive independently.

I urge the County Commission to approve Malibu's separation. It is time to give Malibu the representation and control it needs to provide a strong educational future for its students.

Sincerely,

Emily Thompson

From: Benton Ward <bentonward@gmail.com>

Sent: Thursday, March 13, 2025 12:34 PM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: Separation from SMMUSD-public comment for 3-17 meeting.

I write today to implore you to help facilitate a separation of Malibu from the SMMUSD. It's our second day in a row of sunny skies with the occasional scattered showers-and our school has been closed both of these gorgeous days. It's another decision in a series of decisions this year that are not focused on getting our kids educated, but rather on avoiding any liability in the interest of safety. Safety is absolutely critical, but these last few days only showed a potentially unsafe weather forecast, a hazardous situation never materialized, and still our schools were closed. This isn't the first or even second time we've been closed due to the risk of adverse weather when that weather never appeared. It is just beyond frustrating.

A day this December all schools in Malibu shut down because of a power outage. But my daughter's school actually had power(Malibu's other 3 schools did not). It's unbelievable infuriating to think that if some schools within our city have no power, the district would choose to shut down ALL schools. The district is not bothering to take the unique challenges our area has in mind and instead making blanket decisions that negatively affect our children's ability to get an education.

My son is in Malibu preschool today. Our neighbors kids are in school at OLM, a private Malibu school in across the street from Webster, my daughter's school. Why are the public schools closed? All Malibu businesses are open. Why are schools closed??? I firmly believe if Malibu was its own district we would be able to make decisions with the best interests of our community in mind.

Some kids at an elementary school in Pacific Palisades were in school at a different campus in Brentwood the day after the Palisades fire started. Their homes had burned, their community was devastated. Their district rose to the challenge and was there for them. Palisades schools took merely a few days to find ways to get kids in front of educators at other campuses within the LAUSD district. Their districts worked hard to see a continuing education for their students. The fact is SMMUSD has not. Challenges happen. Difficult decisions have to be made, and not everyone will be happy. But if one school can be open in our area, why can't another? If one school in the Palisades can be open in a new location the day after a disastrous fire, why would our schools be closed for weeks after-or our students not be given the opportunity to be in front of educators at another facility??? The answer is simple. It's because SMMUSD does not burden itself with the additional effort required to ensure a continuing education for children who live in our unique and remote area. Action plans could be put in place when hazardous situations occur that involve getting children in front of educators.

Recent unnecessary school closures aren't the only reason to warrant a separation. Our kids are not getting the support they need from SMMUSD. We are but a mere drop in the bucket in terms of overall district enrollment. It's no wonder that our voices are seemingly unheard or dismissed. Our tax dollars are funding schools that are always open, as they don't encounter the same challenges our community does. We need a district that meets these unique challenges head on and makes decisions with the best interests of our own community in mind.

Thank you,

-Benton Ward

From: Ali Moses <alimoses11@gmail.com>

Sent: Thursday, March 13, 2025 12:54 PM

To: Mitchell_April <Mitchell_April@lacoed.edu>

Subject: Urgent Action Needed: Malibu's Education Crisis & District Separation

Dear Ms. Mitchell,

I am writing to express my deep frustration and disappointment over the ongoing delays in separating Malibu from SMMUSD. This is a **critical time for Malibu**, and we **cannot afford to wait any longer**. The lack of urgency from the District is directly harming our community, our children, and the future of Malibu schools.

Our students are suffering. **Frequent school closures since November 2024** have resulted in **significant learning loss**, with no real plan in place to support students or catch them up. There has been **no remote learning option**, no structured educational recovery plan, and **no meaningful response from the District** despite the continued disruptions. Teachers are doing their best under impossible circumstances, but they are not being supported either. Malibu needs **its own district**—one that can **prioritize** its students, teachers, and unique needs without being ignored by Santa Monica-based decision-makers.

On top of this, **power supply concerns remain unaddressed**, despite Malibu repeatedly raising the alarm. **Families are leaving** because of **safety concerns**, the District's **failure to listen**, and a **one-size-fits-all approach** that simply **does not work** for Malibu.

The result? **Declining enrollment**. Parents are losing faith in this system and **seeking alternatives**—not because they want to leave, but because they feel they have no other choice. Meanwhile, as a **basic aid district**, SMMUSD benefits financially from Malibu's declining enrollment, while our community **suffers the real consequences**—shrinking schools, instability, and a lack of local control.

Enough is enough. If Malibu does not gain **independent control** over its schools now, our community will continue to shrink, and our students will continue to pay the price. **We need action**. We need our own school district to **rebuild, regain trust, and protect the future of education in Malibu**.

The time for delays is over. We demand urgent movement on this separation before more families are forced to leave. Malibu's students **deserve better**, and we will not stop fighting for them.

Thank you for your time and attention to this matter,

Ali Moses

Malibu Elementary School Parent

From: Craig Foster <chfoster.2012@icloud.com>

Sent: Thursday, March 13, 2025 1:20 PM

To: Mitchell_April <Mitchell_April@lacoed.edu>

Cc: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: A Letter of Sadness, Support and Hope (Please Distribute for the Mar 13 County Committee Meeting)

Dear County Committee Members and Staff,

Please see at the far bottom of this email the email I sent to my former SMMUSD school board colleagues and new school board members with regard to unification and the Palisades Fire.

The TL:DR from my email is this:

In the shadow of the Palisades Fire it must be obvious that Malibu is a category difference from Santa Monica.

Malibu and Santa Monica do not belong under a single unified command and political governance structure. It benefits neither city and it is particularly challenging with regard to the needs of distant and tiny Malibu.

I hope this is now obvious to any informed observer, as you all are.

What might be less obvious and of lingering concern to you all is the viability of a MUSD post-Palisades.

First off it needs to be said that a strong public school system is ESSENTIAL to a vibrant city of Malibu. This was true before these recent fires and is so much more true after. Parents with children is the lifeblood of a city and a locally controlled school district is far more likely to feel and respond to the existential need for a high functioning school district than one controlled by residents and board members from a distant city. We in Malibu will not back away from the challenge of rebuilding after repeated wildfires because it is hard. Rather, we must and do commit ourselves fully because it is a necessary step on the road to recovery. This only we can and will do for ourselves.

Related, Malibu has long experience and skill in wildfire recovery. Our local leadership is neither daunted nor overwhelmed by this task. We know how to rebuild, it is what we do. This is not true for Santa Monica, which has neither the experience nor the existential need. Indeed, their incentives work against their commitment. The lower the Malibu public school population, the greater the per student revenue in Santa Monica. While I do not doubt their good faith, the Santa Monica dominated school board has neither the expertise nor the incentives to take the necessary tasks on as Malibu would for itself.

Also related, it may seem from the news that Malibu has been devastated completely in the way it seems the Pacific Palisades has been. That is not the case. While the damage to eastern Malibu has been crushing, the city center and western Malibu stand unaffected. And we the people of Malibu remain committed to a strong, central public school system in our town. My neighborhood burned and I am still writing to you today. Wade Major, head of Advocates for Malibu Public Schools (AMPS) lost his house and he too is writing and speaking to the school board and to you. We are not running away, we are doubling down on the future of our community and the central, vital place of public education in our community.

You may further wonder about the financial wherewithal of MUSD to weather this and possible future disasters.

Please remember, SMMUSD, Santa Monica, and Malibu are *all* basic aid districts. One of the great strengths of basic aid is that it is countercyclical. As enrollment falls, dollars per student rises. Our programs, services, teachers, staff, and quality of education are all insulated against the temporary enrollment decreases that often accompany natural disasters. This resilience is independent of Santa Monica's per student revenues which, under the financial philosophy and agreements we have always supported, are stable, sufficient, and predetermined.

Further, while this disaster did not meaningfully affect school facilities, please know we currently have new bond passed in 2024, sufficient bonding capacity for any potential future needs, and a community that overwhelmingly supports our school facility needs.

Please know, whatever concerns you have on our behalf, these are reasons to move forward with unification expeditiously, not reasons for pause. Malibu needs MUSD now more than ever as we rebuild from a truly horrific series of natural disasters.

Thank you for your support, compassion, and caring.

Craig

—

Craig Foster

SMMUSD Board Member, Retired (2014-2022)

310.663.1157

Begin forwarded message:

From: Craig Foster <chfoster.2012@icloud.com>

Date: Sunday, Feb 02, 2025 at 3:11 PM

To: Board of Education <brd@smmusd.org>

Subject: A Letter of Sadness, Support and Hope

Hello my former colleagues and new board members since I retired,

I wish you well and extend my support and sympathies for the various challenges you have faced over the past few years and face even more today.

I would like to communicate one simple point to all of you, a point I have tried, and mostly failed, over the years to make as clear and as intuitive for you as it is for me.

These tragedies of the Palisades and Eaton Fires are beyond description. My heart breaks for so many across Los Angeles who have lost so much.

For those of us in Malibu who have advocated for a locally controlled Malibu school district I have perhaps some hope that finally what has been clear to us will also now be clear to board members, leaders, and political influencers in Santa Monica.

In the shadow of the Palisades Fire it must be obvious that Malibu is a category difference from Santa Monica.

Malibu and Santa Monica do not belong under a single unified command and political governance structure. It benefits neither city and it is particularly challenging with regard to the needs of distant and tiny Malibu.

If there is any good to come out of this huge tragedy (and all the other tragedies since Woolsey), it is that it might show you intuitively and inarguably how *not* Santa Monica we are.

So far, we have been lucky. No natural disaster has caught our children at school or in buses, no fire event has destroyed our facilities. But you, the overwhelmingly Santa Monica-elected, Santa Monica-resident board, overseeing overwhelmingly Santa Monica-based schools have devoted hours and hours, weeks and weeks, to attempting to understand and address unique Malibu issues. All credit for willingness and trying, but this neither serves your majority interests nor our minority interests.

I hope this is clear, that you all can see that we are not you. That you are masters in someone else's house. That our needs are *our* needs, importantly different and, different or not, best decided by the community upon whom the weight of the decisions will fall.

The financial disagreements of separation are now minor, well within the shadow of overall uncertainty. Going our separate ways, I hope, can now be seen as a practical necessity for all rather than as a mere financial puzzle.

I put to you all that decency deserves you exit governance over Malibu quickly and gracefully so we can take the reins and rebuild for our unique future. Please acknowledge in the moment of echoing existential crises for my community that you cannot do better for us what we should be doing for ourselves.

In hope for empathy in this moment and wish you strength for all the wise but difficult decisions I trust you will make going forward,

Craig

—

Craig Foster

SMMUSD Board Member, Retired (2014-2022)

310.663.1157

From: Jessica DiPaola <heyjessd@gmail.com>
Sent: Thursday, March 13, 2025 1:21 PM
To: Mitchell_April <Mitchell_April@laoe.edu>
Subject: Urgent: In Support of Malibu Separating from SMMUSD

Hello April,

I am a parent of two students at Malibu Elementary School and I'm writing in support of separating Malibu from the SMMUSD. I write this to you as my two sons are *home* due to another school cancellation.

The last meeting I attended in person regarding the district separation (before the recent fires) was the best example of the SMMUSD Board truly showing entitlement and carelessness for our community. During the meeting, students affected by the Woolsey Fires (and past fires) spoke up about how there was no support from the district. No educational plan, they felt abandoned and "on their own," missed finals in high school, and so many more horrible stories of neglect.

Fires are increasingly becoming a reality in Malibu. Something the board whose offices are two cities away in Santa Monica, clearly does not understand. The Board tries everything from blaming the teachers union, blaming the handful of students who take the bus to school, blaming the wind, and do everything but take responsibility for being incapable to provide basic needs to keep our schools open. (It is important to note that power shutting off doesn't necessarily always mean unsafe conditions, rather a preventative act imposed by SCE – from being sued after the Woolsey fires).

Years after the Woolsey fires, we see the district's neglect once again to provide basic needs for our school, after the recent Franklin and Palisades fires. I think our students have lost... 20 days of school since December and have had maybe 3 zoom sessions. We had to fight for a generator and for some kind of continued learning for our students to make up what was lost. Nothing proactive from the district. (Had we said nothing, they would have been perfectly content closing schools as the only solution.) Our teachers are strained, our students are strained, community is strained and getting hopeless. Hopelessness is not a feeling anyone should feel as it relates to their education!

I am a first generation American, I have experienced neglect and will fight so my children and all the children in our community, are NOT neglected. I won't stand for their school system FAILING them. This is all not okay.

SMMUSD is showing us that they truly do not care. They show time after time that they cannot meet our needs, they cannot even understand them. They constantly joke about how hard it is to get to meetings in Malibu – and that alone says so much.

I urge you to support us and our children, to give us equity, and to support the district separation so Malibu people can help sort out Malibu issues and give our schools and students what they need to thrive!

Thank you for your time,

Jessica DiPaola

From: Kimberly Ford <kimford2019@gmail.com>

Sent: Thursday, March 13, 2025 1:24 PM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: Malibu Santa Monica School Separation

Hi Ms. Mitchell,

I cannot attend the in person or Zoom meeting with the County Commission regarding forming a separate Malibu School District, therefore I'm sending this email. I'm writing in support of the separation between Malibu and Santa Monica and the formation of a new Malibu School Districts. I have two children that attend Malibu schools, my daughter attends Malibu Middle School and my son attends Malibu Elementary.

The recent fires and power outages have exaggerated the already necessary need for a separate school district. For starters, Santa Monica and Malibu are not physically located near each other. Santa Monica keeps closing Malibu schools with no regard to remedying the problems affiliated with power outages. Even with two access roads out of Malibu, they close the schools because buses from Santa Monica cannot make the drive to Malibu. A bus does not drop off at my son's school, Malibu Elementary, yet they still close the school if the buses cannot make the drive to Malibu. There are very few students and staff actually located in Santa Monica that attend or work in Malibu schools. My kids have missed countless days of school (over a month) due to power outages and road closures. This is unacceptable, both for their learning needs and for my ability to work. The Santa Monica school district is completely out of touch with the needs of Malibu residents and students. We (Malibu residents) cannot achieve adequate representation on the school board due to our small size. We are at the mercy of a Santa Monica dominated school board making all of our decisions for us. Aside from wanting autonomy and to make decisions that actually benefit the children of our Malibu community, Santa Monica has repeatedly denied an equitable solution to splitting the school district. Malibu has presented solutions which allow Santa Monica to continue to function with economic stability, but have had every request and offer denied with no viable solution offered in return.

Families are fed up with the joint district and no fair representation of Malibu interests. With our own district, more students will return to Malibu and strengthen our community.

Please support the separation of Malibu from Santa Monica and the formation of our own school district.

Thank you,

Kim Ford

Malibu Resident

kimford2019@gmail.com

805-452-6588

From: Darshan Shah <drshah@drshah.com>

Sent: Thursday, March 13, 2025 1:34 PM

To: Mitchell_April <Mitchell_April@laoe.edu>; Nancy Shah <nancy@drshah.com>

Subject: separation of Malibu and Santa Monica School districts

Dear Mitchell-

we have two children in Malibu Schools at MES

It is IMPERATIVE we separate Malibu from Santa Monica schools

Our schools are continually shut down, and Santa Monica cannot manage the road closures, fires, etc. effectively. It has been a disaster of a year, with the worst management ever of these events.

There is no plan for power, catch up on education, nothing.

Malibu needs to take care of its own and stop this ludicrous excuse for schooling that is currently the state in Malibu.

DARSHAN SHAH, MD

FOUNDER & CEO | MEDICAL DIRECTOR

From: Ana Sanson <ana.c.sanson@gmail.com>

Sent: Thursday, March 13, 2025 1:48 PM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: In FAVOR of SEPARATING from SMMUSD: It's Not just a preference, it's Necessity

Dear Ms. April Mitchell,

The recent crisis following the Palisades Fire has laid bare a reality that we in Malibu have warned about for years: our schools cannot be effectively managed by an administration that is miles away, both physically and in priorities. Between road closures, power shutoffs, fires, mudslides, and wind events, Malibu's students have endured repeated school closures without a real plan to address lost learning. This is unsustainable both for the children and for us, as working parents.

We need local control of our schools—now. SMMUSD's one-size-fits-all approach simply does not fit Malibu. The failure to implement a robust remote learning strategy, the lack of communication on power infrastructure solutions, and the ongoing neglect of Malibu's specific needs are driving families away. With every departure, our enrollment declines—not because families don't want to be here, but because they feel they have no choice.

The crisis we are experiencing today was predictable. We warned that the distance between Malibu and Santa Monica's administration would prove inadequate in times of emergency, and now we are living that reality. Our teachers are doing everything they can, but without a district that prioritizes Malibu's needs, they are fighting an impossible battle. Meanwhile, the current enrollment decline in Malibu has become a financial gain for SM-MUSD at the expense of our children's education and our community's future.

Malibu families deserve a school district that listens to them, and can take swift, decisive action to protect their children's education. I understand that safety is being touted as the #1 priority and why they continue to close schools at this point, but the sun is shining, and there is no rain today, and yet... we are still closed. An independent Malibu Unified School District is not just a preference—it is a necessity.

The time to act is now. We cannot afford more delays. Our community is ready to step up and take responsibility for our schools. We urge you to support Malibu's right to self-governance in education before we lose even more families, more teachers, and more trust in a system that has already left us behind.

Sincerely,

Ana Sanson

Resident of Malibu

ana.c.sanson@gmail.com

From: Amy Lingo <amylingo@aol.com>
Sent: Thursday, March 13, 2025 1:56 PM
To: Mitchell_April <Mitchell_April@laoe.edu>
Subject: Malibu School District Separation

Dear Ms. Mitchell,

This is a critical time for Malibu and we need to act NOW. We need to be able to create our own school district, with control over our own problems and representation with a District that will listen to us, to be able to rebuild after the fires. If this does not happen now, enrollment will continue to decline as families move away.

Malibu schools have been closed so often with no real plan on catching students up on their education. No plan in place for remote learning or how to address ongoing loss of learning time, even though schools have been closing frequently since November 2024. Teachers are working hard but this is an impossible task for them. The teachers are with us in this fight and the District is not supporting Malibu staff either. Malibu needs its own district to be able to urgently address the things its community needs. If this does not happen, enrollment will continue to decline.

Plan for power still has not been addressed – Malibu knows the urgency here and Santa Monica has not communicated any updates.

Many families are leaving because of safety concerns and issues with the District not listening to their input. The District is taking a one-size fits all approach that does not fit Malibu.

These issues and delays have led to declining enrollment as families lose faith in the district and seek alternative educational options. Enrollment can and will go up if we have a local school district that we have control over to decide our own community issues.

As a basic aid district, a decline in Malibu's enrollment means more "per student" funding . for SM-MUSD. What is a financial gain for the school district is an enrollment crisis in the Malibu community, as we are losing families due to lack of control of our education system. An independent Malibu USD will better serve the interest of the Malibu communities.

Thank you,

Amy Lingo

Mother of 2 kids (8yo, 11yo) at MES

From: Winnie Johnson <winniebelle449@gmail.com>

Sent: Thursday, March 13, 2025 1:58 PM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: Separate schools for Malibu

Dear Ms. Mitchell,

I am writing to express my strong support for Malibu's separation from Santa Monica-Malibu Unified School District (SM-MUSD). The need for an independent Malibu school district has never been more urgent, and the challenges we have faced in recent years highlight why this separation is essential for the well-being of our students, families, and educators.

Malibu has endured repeated school closures, power outages, and natural disasters, with little to no proactive response from SM-MUSD. The recent Palisades Fire, combined with ongoing disruptions since November 2024, has resulted in significant lost learning time for our students. Despite these ongoing issues, there has been no clear plan for remote learning or academic recovery. Teachers are doing their best under impossible circumstances, but without a district that prioritizes Malibu's unique needs, students will continue to suffer.

Additionally, enrollment in Malibu schools has declined as families move away due to safety concerns and lack of district support. The current one-size-fits-all approach does not work for our community, especially when geographic barriers such as fires, mudslides, and road closures separate Malibu from Santa Monica leadership. Malibu needs a district that can respond directly to its own challenges rather than being an afterthought in a larger system.

Financially, Malibu has long contributed significantly to SM-MUSD, yet our concerns have been ignored. The proposed revenue-sharing model is fair and ensures that Santa Monica schools remain financially stable while allowing Malibu to manage its own educational future. This is not about taking resources away from Santa Monica; it is about ensuring both communities can thrive independently.

At its core, this issue is about local control. Malibu's students deserve leadership that is present, engaged, and dedicated solely to their success. It is clear that remaining under SM-MUSD is no longer a viable option for our community. We must move forward with an independent Malibu Unified School District to ensure a sustainable future for our students.

I urge the County Commission to approve Malibu's separation so that we can take responsibility for our own schools and provide our children with the education they deserve. Thank you for your time and consideration.

Best regards,

Winnie Johnson

winniebelle449@gmail.com

From: Ashton Bridges <ashton.u.bridges@gmail.com>

Sent: Thursday, March 13, 2025 2:01 PM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: Malibu Unification (Written Comment for March 19th hearing)

Dear Acting County Committee Secretary Mitchell,

I am the mother of three young children and reside in the Point Dume neighborhood in Malibu. Our eldest is currently in Kindergarten and next fall, our youngest two will be in TK.

As a parent, it is clear to me that Santa Monica is unable to service the basic needs of Malibu Schools and our kids. We need (and deserve) our own district. Let me elaborate.

The recent fires, school closures and poor communication have made it painfully clear that SMMUSD is not able to manage such a large and non-contiguous district in times of crisis. Malibu schools have been closed so often, with no real plan on catching students up on their education. There is no plan in-place for back-up electrical power, nor for remote learning, or how to address ongoing loss of learning time - even though schools have been closing frequently since November 2024.

This academic year has been so miserable, families such as mine are beginning to abandon the public school system. Speaking personally, without independence/unification we will unenroll our kids and send them to private school.

If we are to separate, Malibu's proposed revenue-sharing model provides more than generous support of Santa Monica schools. Nearly all Malibu taxpayers would agree that we have offered too much - but if that's what it takes to have our kids and our schools free from the incompetence in Santa Monica, so be it.

Sincerely,

Ashton Bridges

3108660948

From: Tiffany Owhadi <owhadifamily@gmail.com>

Sent: Thursday, March 13, 2025 2:03 PM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: Malibu Schools

Dear Ms. Mitchell,

I am writing to express my strong support for Malibu's separation from Santa Monica-Malibu Unified School District (SM-MUSD). The need for an independent Malibu school district has never been more urgent, and the challenges we have faced in recent years highlight why this separation is essential for the well-being of our students, families, and educators.

Malibu has endured repeated school closures, power outages, and natural disasters, with little to no proactive response from SM-MUSD. The recent Palisades Fire, combined with ongoing disruptions since November 2024, has resulted in significant lost learning time for our students. Despite these ongoing issues, there has been no clear plan for remote learning or academic recovery. Teachers are doing their best under impossible circumstances, but without a district that prioritizes Malibu's unique needs, students will continue to suffer.

Additionally, enrollment in Malibu schools has declined as families move away due to safety concerns and lack of district support. The current one-size-fits-all approach does not work for our community, especially when geographic barriers such as fires, mudslides, and road closures separate Malibu from Santa Monica leadership. Malibu needs a district that can respond directly to its own challenges rather than being an afterthought in a larger system.

Financially, Malibu has long contributed significantly to SM-MUSD, yet our concerns have been ignored. The proposed revenue-sharing model is fair and ensures that Santa Monica schools remain financially stable while allowing Malibu to manage its own educational future. This is not about taking resources away from Santa Monica; it is about ensuring both communities can thrive independently.

At its core, this issue is about local control. Malibu's students deserve leadership that is present, engaged, and dedicated solely to their success. It is clear that remaining under SM-MUSD is no longer a viable option for our community. We must move forward with an independent Malibu Unified School District to ensure a sustainable future for our students.

I urge the County Commission to approve Malibu's separation so that we can take responsibility for our own schools and provide our children with the education they deserve. Thank you for your time and consideration.

Sincerely,

Tiffany Owhadi

From: Chelsea Bulte <chelseabulte@gmail.com>

Sent: Thursday, March 13, 2025 2:03 PM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: Separation district

Hi,

I am writing to express my deep frustration and concern regarding the ongoing challenges facing our schools, particularly the frequent closures that have severely impacted our children's education and our community as a whole. As a parent of a fifth-grade student and a business owner in Malibu, I have firsthand experience with the difficulties these closures create—not only for students but also for working families who are left scrambling to adjust.

This school year alone, my child has missed an alarming number of days due to closures caused by wind, rain, and other weather conditions. Today, for example, the weather is mild, yet schools remain closed. These disruptions are taking a serious toll on our children's learning, making it increasingly difficult for them to stay on track academically. As my son prepares to enter sixth grade, I am deeply concerned about the long-term effects of these lost instructional days.

Beyond the academic impact, these closures present major challenges for working parents. Like many in our community, I rely on a functioning school system to be able to run my business. Each unexpected closure forces parents to stay home, resulting in lost income and productivity. This situation is simply not sustainable, especially in a place like Malibu, where the cost of living is already high. Parents should not have to choose between providing for their families and ensuring their children receive a proper education.

In addition to the issue of closures, I find it deeply unfair that the money we, as a community, work tirelessly to raise for our schools is not fully benefiting our own children. Every year, we dedicate time, energy, and resources to fundraising in the hopes of enhancing our children's education—providing access to art, music, and even language programs. However, these funds are redistributed across other areas of the district, rather than being reinvested in the schools that raised them. This system is not only inequitable but also discouraging for parents who are doing everything they can to improve the educational experience for their children.

For these reasons, I strongly support the separation of our school district. With local control, we could make decisions that directly address the unique challenges our schools face, ensure that our fundraising efforts benefit our own students, and create a more stable and enriching learning environment. Our children deserve consistency in their education, and our community deserves the ability to govern its own schools in a way that best serves its needs.

I urge you to take action on this issue and seriously consider the benefits of district separation. Our children's education, our local businesses, and the strength of our community depend on it.

Sincerely,

Chelsea Bulte parents to Liv Snyder kinder and Cade corliss 5th

From: Chelsea Bulte <chelseabulte@gmail.com>

Sent: Thursday, March 13, 2025 2:05 PM

To: Mitchell_April <Mitchell_April@laoe.edu>

Subject: School separation

Hi,

I am writing to express my deep frustration and concern regarding the ongoing challenges facing our schools, particularly the frequent closures that have severely impacted our children's education and our community as a whole. As a parent of a fifth-grade student and a business owner in Malibu, I have firsthand experience with the difficulties these closures create—not only for students but also for working families who are left scrambling to adjust.

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In addition to the issue of closures, I find it deeply unfair that the money we, as a community, work tirelessly to raise for our schools is not fully benefiting our own children. Every year, we dedicate time, energy, and resources to fundraising in the hopes of enhancing our children's education—providing access to art, music, and even language programs. However, these funds are redistributed across other areas of the district, rather than being reinvested in the schools that raised them. This system is not only inequitable but also discouraging for parents who are doing everything they can to improve the educational experience for their children.

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I urge you to take action on this issue and seriously consider the benefits of district separation. Our children's education, our local businesses, and the strength of our community depend on it.

Sincerely,

Chelsea Bulte parents to Liv Snyder kinder and Cade corliss 5th

From: Ingrid Shoshan <ingridraines@msn.com>
Sent: Thursday, March 13, 2025 2:17 PM
To: Mitchell_April <mitchell_april@laoe.edu>
Cc: David Shoshan <david@imageworksent.com>; ingidraines@msn.com
Subject: Malibu school separation

Sending the below again, to ensure it made it to you... Thank you!

Dear Ms. Mitchell,


I am hoping to have my comments added to record for this next meeting, with regard to the Final District Separation. As a mother of four young children, in attendance at Malibu Elementary School and Malibu Middle School, it has become BLARINGLY APPARENT that the utter lack of regard for our unique and remote location here in Malibu, is negatively affecting our children. The distance between the District's Administration in Santa Monica and that of our actual schools here in Malibu, is increasingly detrimental to the overall well-being and most certainly, the academics for our local youth.

Has it not been shared with you over and over again that we, here in Malibu, need an entirely different arrangement to serve our students during times of challenge due to weather??? With more frequent power outages and disruption caused by natural disasters and ever-turbulent weather conditions, we must adapt to serve OUR COMMUNITY and OUR LOCAL MALIBU STUDENTS. This is no longer something that should be left up to an administration residing and working from afar. I believe there are ENDLESS examples that you likely have at your fingertips to prove my point, and if not, please do be in touch and I will gladly provide this for you!

We pay an exorbitant amount of property taxes to live in this beautiful location and OUR CHILDREN deserve for our tax dollars to be spent on their SAFETY and EDUCATIONAL opportunities HERE IN MALIBU. WE should not need to ask permission from afar and or seek all sorts of supplemental learning opportunities outside of school to support our kids here. We must have a local base to source from, controlled by and alongside OUR MALIBU COMMUNITY MEMBERS. THIS SEPARATION FROM SANTA MONICA IS LONG OVERDUE. The time is now to make this urgent change come to fruition. OUR CHILDREN ARE THE FUTURE AND WE MUST SUPPORT THEM WITH THIS INCREDIBLY IMPORTANT SEPARATION NOW.

Thank you,

Ingrid Shoshan

 Mom of Maverik, Macloud, Marcella and Maguire

From: David Allison <david@nikoftime.com>

Sent: Friday, March 14, 2025 07:49 AM

To: Hass_Eric <Hass_Eric@lacoed.edu>; Karmel Allison <karmel@coffice.com>; Mitchell_April <Mitchell_April@lacoed.edu>; Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>; Talbot_Elizabeth <Talbot_Elizabeth@lacoed.edu>; Deegan_Allison <Deegan_Allison@lacoed.edu>

Cc: Kelsey McKinnon <kelsey.mckinnon@gmail.com>; Maggie Castle <castle.maggie@gmail.com>

Subject: Re: Malibu Schools need to be able to self-manage

I'd like to add a few notes please.

Dear April and the committee:

My name is David Allison and I've been in the Malibu Community raising my kids for 4 years. Additionally, I've owned property in Malibu and contributed to its tax base and SMMUSD for a decade. When I moved here with my kids, I joined the PTA, promoted SMMUSD programs, volunteered, and later even joined the PTA board to fundraise for our schools.

In that time, I feel like the constant message from the school is "we can't meet the needs of our students and family and we don't feel responsible for improving" — we had nearly *20* missed days of school in January, and it seems like our communication with Antonio Shelton, the district board, and others fell on completely deaf ears.

There was such a lack of understanding regarding the problems our schools and children face (such as the impact of a red flag day and the district's policy on it). Huge delays on generators. Huge delays on backup internet (I even went to the school to attempt to help, only to be told that Starlink units were donated, and then to be told a day later that the district did not allow them to be installed!)

I am a parent. I am trying to take care of my kids. I grew up in California and my parents sent me to public schools. My wife and I believe in public schools' positive impact on the community.

That said, I feel that my family and my broader community are completely unserved by SMMUSD, and I feel that my children **are not receiving equal access to education. They are not being given the same opportunities as their peers 20 miles away in the same district.**

They are being denied education, they are being denied socialization, and it's obvious to the broader Malibu community how self-governance could solve these problems.

I have been following the SMMUSD split saga for the decade+ that I've had a connection to the area, and now that I live here, **I simply cannot believe how negative the impact of having a joined district is.**

It is unconscionable that the split hasn't happened yet, and it's unconscionable that Malibu isn't self-governing its schools.

That's my feedback. I think that things have gotten so bad, that if parents in Malibu wanted to, they would have an easy case to make that SMMUSD is denying their children equal access to education.

That seems pretty bad (bad enough for me to write a letter), and I can't understand why the people in power don't see this clear result from their poor decision making, and then seek to immediately rectify it.

Best,

David Allison

415-233-1420

From: Karmel A <karmel@coffice.com>

Sent: Thursday, March 13, 2025 10:47 AM

To: Mitchell_April <Mitchell_April@laoe.edu>

Cc: David Allison <david@nikoftime.com>

Subject: Malibu Schools need to be able to self-manage

Dear April,

I am forwarding one of many threads I have in my inbox surrounding our attempt to ensure our three children, in third and fifth grade at Malibu Elementary and one waiting in the wings for Kindergarten, are receiving an adequate education.

We have been begging the district and the school board for months to communicate plans earlier than the night before, to have backup plans for when winds are high or roads are closed, but it is like pulling teeth to get them to even send us emails, much less to fund necessary improvements.

This is not surprising; we are a small fraction of the students that the Santa Monica school district needs to care for, and we have unique needs that they do not understand. Many times, I have been taken aback by how little Dr. Shelton and others understand of the Malibu ecosystem— but of course why should they; they don't live here and don't need to understand the intricate relationship between wind and fire and power and landslides at our schools.

We are once again without school today, even though the sky is blue and we're all here, and everyone's healthy, and most of the teachers can make it in.

My son is in honor band, and he has spent as much as six hours in a single day commuting to Santa Monica so he can practice for the upcoming concert. It just doesn't make sense; especially now with PCH closed, Santa Monica is a 1.5 to 2.5 hour drive from us.

We are not the same city, climate, geography, or demographics. We can continue to argue and fight about who gets what and when this can happen, but it is our children and their education that are suffering. If the situation doesn't improve, we will be forced to make different decisions about where we enroll our children to protect them from the political nonsense of their elders.

Thank you for your consideration in this matter,

Karmel Allison

858-353-8390

Begin forwarded message:

From: "Shelton, Antonio" <ashelton@smmusd.org>

Subject: Re: We need a plan for long-term road closures

Date: January 30, 2025 at 8:20:07 AM PST

To: Karmel A <karmel@coffice.com>

Cc: David Allison <david@nikoftime.com>, "Kean, Jon" <jkean@smmusd.org>, "Leon-Vazquez, Maria" <mlvazquez@smmusd.org>, "Smith, Jennifer" <jsmith@smmusd.org>, "Lieberman, Laurie" <llieberman@smmusd.org>, "Mignano, Alicia" <amignano@smmusd.org>, "Rouse, Stacy" <srouse@smmusd.org>, "Tahvildaran-Jesswein, Richard" <rtahvildaranjesswein@smmusd.org>, "Burgess, Isaac" <iburgess@smmusd.org>

Good morning!

It is my hope that the plan will be completed this week, therefore allowing us the option. We need a canyon to be open to ensure that a bus can travel through. PCH is great, but we also need to be able to get to kids who have been displaced and currently live east of the canyons. As mentioned before, that canyon cannot be Kanan Rd. We will discuss further with the team requirements that must be met with the anticipation of rain, which is something that we have discussed.

We will communicate with families.

Sincerely,

Antonio

From: Karmel A <karmel@coffice.com>

Date: Wednesday, January 29, 2025 at 3:41 PM

To: Shelton, Antonio <ashelton@smmusd.org>

Cc: David Allison <david@nikoftime.com>, Kean, Jon <jkean@smmusd.org>, Leon-Vazquez, Maria <mlvazquez@smmusd.org>, Smith, Jennifer <jsmith@smmusd.org>, Lieberman, Laurie <llieberman@smmusd.org>, Mignano, Alicia <amignano@smmusd.org>, Rouse, Stacy <srouse@smmusd.org>, Tahvildaran-Jesswein, Richard <rtahvildaranjesswein@smmusd.org>

Subject: Re: We need a plan for long-term road closures

Hi Antonio,

Online is better than nothing— though does the fact that the buses can pass through on PCH change anything?

There is supposed to be **an inch of rain next Wednesday** in Point Dume; will we be ready by then? Is somebody already in contact with the sheriffs and the city so that we can hear whether there will be road or school closures as early as possible?

Thank you for your continued attention and help in these matters,

Karmel

On Jan 27, 2025, at 4:43 PM, Shelton, Antonio <ashelton@smmusd.org> wrote:

Hello!

We are meeting with our bargaining unit tomorrow to solidify a plan in the case that this happens. The MOU will solidify details that would provide instruction on zoom if we are out of school. The substitutes must have access as well, and I am not certain that we would have enough. Having only two roads as a means of access becomes a very difficult challenge, especially when we cannot have a school bus travel Kanan in the case of an emergency. Our district busses are not allowed on this road, giving us only one exit or entry to point to Malibu. We have the resources for distance learning and will use those resources if we have continued weather complications.

Sincerely,

Antonio

From: Karmel A <karmel@coffice.com>

Date: Sunday, January 26, 2025 at 8:52 PM

To: Shelton, Antonio <ashelton@smmusd.org>

Cc: David Allison <david@nikoftime.com>, Kean, Jon <jkean@smmusd.org>, Leon-Vazquez, Maria <mlvazquez@smmusd.org>, Smith, Jennifer <jsmith@smmusd.org>, Lieberman, Laurie <llieberman@smmusd.org>, Mignano, Alicia <amignano@smmusd.org>, Rouse, Stacy <srouse@smmusd.org>, Tahvildaran-Jesswein, Richard <rtahvildaranjesswein@smmusd.org>

Subject: We need a plan for long-term road closures

Hi Dr. Shelton,

There has already been 0.5" - 1" of rain across Malibu and the Palisades.

Do we have a plan for what happens if there are landslides, and roads around Malibu stay closed for weeks at a time? If it doesn't happen this week, it might with the next rain. Can we have a clear plan for parents in place earlier than the night before?

Can we bring in substitutes to cover teachers who can't drive in? Can we leverage state resources for distance learning? There are so many better options than, "Whoops, no school tomorrow again."

Thanks,

Karmel Allison

On Jan 26, 2025, at 6:42 PM, Santa Monica-Malibu Unified School District via Aeries Communications <donotreply+76aba17a-08cf-5d0f-bd8a-b4c6dff09e37@parentsquare.com> wrote:

Santa Monica-Malibu Unified School District

Malibu Schools Will Be Closed Monday, Jan. 27, 2025

Dear Malibu Parents, Guardians, Staff and Community Members,

Malibu schools will be closed Monday, Jan. 27, 2025, due to dangerous road conditions and challenges with access to our schools.

This includes Webster Elementary, Malibu Elementary, Malibu Middle and Malibu High schools.

We are as disappointed as you are in this outcome following our discussions with local partners today.

We have been in communication with the City of Malibu, the Lost Hills Sheriff's Captain, Supervisor Lindsay Horvath's office and the Los Angeles County Public Works Department, throughout the day and based on their updates and warnings regarding roads, and mudflow issues and continued rain, the decision was made to close schools tomorrow with the safety of students and staff as our top priority.

Parents and staff will hear from their Principals with information regarding the continuity of learning to best engage our students while school is closed.


We continue to monitor the situation and will communicate with you again on Monday regarding plans for Tuesday.

Thank you for your understanding and continued support of our safety-based decisions.

Sincerely,

Dr. Antonio Shelton, Superintendent

Mr. Isaac Burgess, Executive Director, Malibu Pathway & Secondary Schools



Feasibility Analysis of the Proposed Reorganization of Santa Monica-Malibu Unified School District into Two Separate Districts

November 2024



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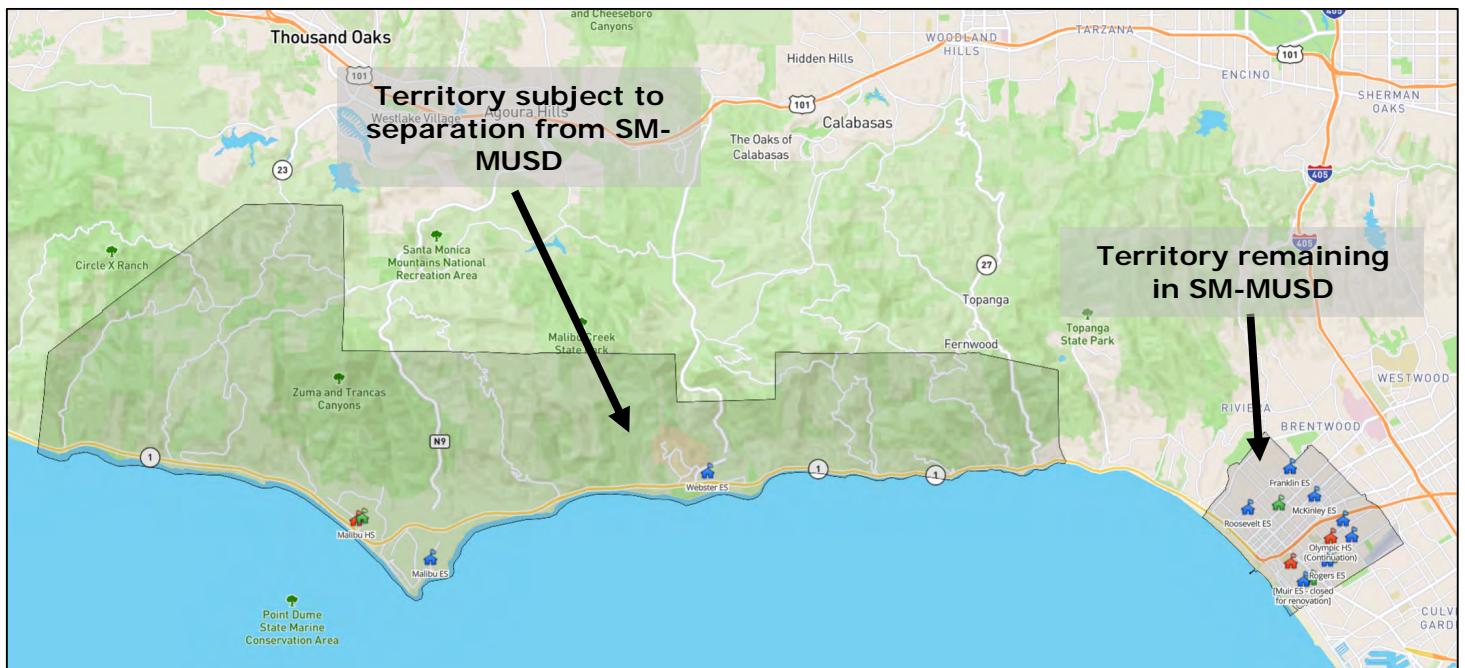
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INTRODUCTION

The City of Malibu and its constituents desire to establish an independent Malibu Unified School District (MUSD) that will have safe, small, academically successful schools. The Malibu community desires a unified educational system whereby educational expectations and accountability are driven by a locally controlled board of trustees representing and accountable to Malibu area residents. This locally controlled educational system will fulfill the community's desire for a coordinated, sequential educational program from preschool through twelfth grade and provide for a more effective use of resources to specifically meet the educational program desires of the Malibu community. This independent MUSD will increase collaboration among school staff and the community to further enrich the educational success of Malibu students.

The proposed reorganization would change the boundaries of Santa Monica-Malibu Unified School District (SM-MUSD) and transfer the responsibility to serve students residing in the City of Malibu, as well as the surrounding unincorporated area of Los Angeles County, to the new MUSD. As shown in **Figure 1**, four school sites, currently located in the Malibu area would be transferred to the new MUSD: Malibu High School; Malibu Middle School; Malibu Elementary School; and Webster Elementary School.

FIGURE 1



The Call to Separate

For over a decade, concerned Malibu citizens have tried to initiate the separation of the Malibu area from SM-MUSD. Moving forward with this separation may ultimately help the remaining Santa Monica Unified School District (SMUSD) follow a new path toward enhanced transparency, improved diversity initiatives, higher accountability, closing the achievement gap, and greater responsiveness overall to the remaining community that it serves, without ongoing distractions from Malibu.

Achievement Gap. The students in the Malibu area have not received the quality of education desired by the Malibu community under the governance of SM-MUSD. More importantly, a study shows that SM-MUSD has also failed to address various diversity initiatives within the District because of its focus on serving Malibu, a distinctly separate community of parents and students. With separation, each of the future school districts will be better suited to utilize their respective resources and address the particular needs of their distinct communities.

Ultimately, the City is seeking separation from SM-MUSD because Malibu students have been and will continue to be harmed with the current school district organization. This is occurring on many fronts. From an academic perspective, although Malibu students usually perform well above state averages, they are missing out on key programs to better prepare themselves for college and the workforce and are seeing lower test scores than their Santa Monica counterparts in key subject areas. Plus, Malibu families are terribly concerned about the steady decline in enrollment in Malibu schools. To SM-MUSD, this is merely a small decline in enrollment since Malibu schools represent a fraction of their total student population. Since it does not concern the District, nothing is being done to keep Malibu students in the schools nor to bring those back that have left. For Malibu, this decline in enrollment and loss of families in the community is an educational crisis that must be addressed.

In addition to the above-mentioned academic programs, Malibu area students that are the most in need are not being served well by the current school district organization. For example, English Language Learners (ELL) in Malibu are consistently left behind and not able to achieve the same success as their Santa Monica area counterparts. The Santa Monica-focused leadership is simply not investing the resources into this student population in Malibu and are letting ELL students fall through the cracks.

Post-reorganization, SMUSD will still have sufficient funding to be able to offer the same programs they currently offer Santa Monica students, while MUSD will have the opportunity to customize its programs to better fit the educational needs of Malibu students.

Higher Accountability. A majority of the student population of SM-MUSD, approximately 88%, reside in the Santa Monica area. As a result, the SM-MUSD administration focuses on the needs and goals of that student population. However, the rural Malibu community is a vastly different type of community than the urban Santa Monica community, and Malibu's student needs are simply not being met with the current school district structure. Further, Malibu residents do not have a strong enough influence to make a change due to the relative size of the Malibu voter base as compared to the Santa Monica voter base. Reorganization is the only solution that will enable Malibu-area residents to determine how to best educate their students.

Community Responsiveness. It is not practical for these two communities – Malibu and Santa Monica – to be joined together. Leaders in both Santa Monica and Malibu concur that separation makes sense. The two communities are geographically detached, separated by portions of the City of Los Angeles and unincorporated Los Angeles County, and commuting between the two communities is time consuming and unsafe. As a result, there is minimal interaction between the two communities leading to a lack of cohesiveness in the school education system.

Importantly, Malibu area residents believe that its local government agencies should live within their means. This is simply not the case with SM-MUSD. Even as a highly funded "Basic Aid" district, SM-MUSD has an ongoing structural budget deficit with disproportionately high administrative overhead. The District's budgetary decisions are not aligned with the expectations of Malibu taxpayers and,

with a lack of local control, the Malibu residents do not have the ability to affect spending decisions. A smaller district will be better able to provide the resources that local students and educators need to succeed because MUSD leadership will be less bureaucratic, closer to classroom needs, and more responsive to community concerns about fiscal management and the educational program.

SM-MUSD currently operates Malibu schools on a completely separate track from Santa Monica schools. Students typically attend school in their local community without much intermingling of students from each community. Community-based organizations and events are not shared between these two communities. The District even created separate facilities funding districts in 2018, when they created two separate bonding districts with one in Malibu and one in Santa Monica, to separately fund school improvements in each community. Since the communities and schools operate separately already, it makes practical sense to officially separate the school districts.

From a health and safety perspective, the SM-MUSD leadership's decision about health and safety needs do not reflect the needs and desires of the Malibu community. Malibu is a rural community faced with fire danger, emergency electrical power outages, mudslides, road closures, and other hazards on an on-going basis. As an urban community, Santa Monica faces its own discrete health and safety challenges, but the challenges are different for each of these communities. This matters because the health and safety of Malibu students are put at risk when SM-MUSD fails to properly respond to and plan for catastrophes that are unique to the Malibu terrain. For example, as the Woolsey Fire started to spread to the Santa Monica mountains on the morning of November 9, 2018, SM-MUSD administration ignored pleas by its lone Board member who lives in Malibu to close schools so that Malibu parents, students, and teachers could focus on the looming crisis. Additionally, when Malibu High was found to have polychlorinated biphenyls (PCBs), SM-MUSD refused to clean up an unsafe school and spent over \$7 million in legal fees fighting against the \$1.6 million it would have cost to remediate the harm. The SM-MUSD leadership is not in tune with the important health and safety issues facing the Malibu community, and separation will ensure that the schools better reflect the needs of these incredibly unique communities. Malibu students would be better served by a locally elected school board and administration that is focused on Malibu.

These are just a few of the issues driving the need for separation. At some point in the past, it may have been convenient for these two communities to be joined, but that is no longer the case. Malibu students deserve a high-quality education that reflects the unique needs and desires of the Malibu community. A separation of Malibu from SM-MUSD is the only way to adequately serve the educational needs of this student population.

A separate MUSD will:

- Create local control to make spending decisions to ensure that the school district lives within its means and to determine the educational programs offered in Malibu schools.
- Enhance the sense of community in the Malibu area with improved cooperation between the schools and local community leaders.
- Protect the well-being of staff, parents, and students by:
 - Eliminating the hazardous commute between the two communities in order for Malibu-area students to benefit from specialized programs and enrichment opportunities currently offered only in Santa Monica; and for Malibu school staff to receive professional development and training without having to put in the additional time and risk of commuting to Santa Monica.
 - Coordinating with the Malibu area public safety officials on the area's unique hazards.

- Responding to the health and safety concerns expressed by Malibu residents that simply do not resonate with Santa Monica leadership.
- Address the enrollment crisis in the Malibu area through targeted educational options demonstrating a responsiveness to student needs.

Mediation with SM-MUSD

Since 2022, the City of Malibu has been in mediation with SM-MUSD to develop a path to separation of the two districts. The guiding principles of this mediation are:

- 1) Formation of an independent Malibu Unified School District is in the best interest of all students.**
- 2) Each successor educational entity to be allocated a sufficient share of funding to provide a similar level of service at each school site as prior to separation.**

In October of 2022, the parties adopted a Term Sheet that set forth concepts for separation that met the guiding principles and identified three agreements that, once drafted and ratified by both parties, would enable a successful separation. Although the agreements are substantially complete, they have not been ratified by the governing boards of either SM-MUSD or the City.

In the absence of a negotiated agreement, the City has established a tax exchange model that provides the future SMUSD and MUSD students with funding commensurate with current funding levels, as stated in the second guiding principle. Further, the tax exchange model provides for structured and ongoing support from MUSD to SMUSD to eliminate any drastic drop in funding from one year to the next. This tax exchange model is described in detail under Criterion #9 of this Feasibility Study.

Summary

This Report has been prepared to address the nine criteria pursuant to Education Code Section 35753 to demonstrate the feasibility of the proposed reorganization. The County Committee and, ultimately, the State Board of Education are asked to consider the tax exchange terms when evaluating the feasibility of the proposed reorganization. Under such terms, this proposed reorganization is feasible.

CRITERION #1: ADEQUATE NUMBER OF PUPILS

Education Code Section 35753(a)(1):

The new district will be adequate in terms of number of pupils enrolled.

California Code of Regulations, Title 5, Section 18573(a)(1):

It is the intent of the State Board that direct service districts not be created that will become more dependent upon county office of education and state support unless unusual circumstances exist. Therefore, each district affected must be adequate in terms of number of pupils, in that:

- (A) Each such district should have the following projected enrollment on the date that the proposal becomes effective or any new district becomes effective for all purposes:
 - Elementary District - 901
 - High School District - 301
 - Unified District - 1,501
- (B) The analysis shall state whether the projected enrollment of each affected district will increase or decline and the extent thereof.

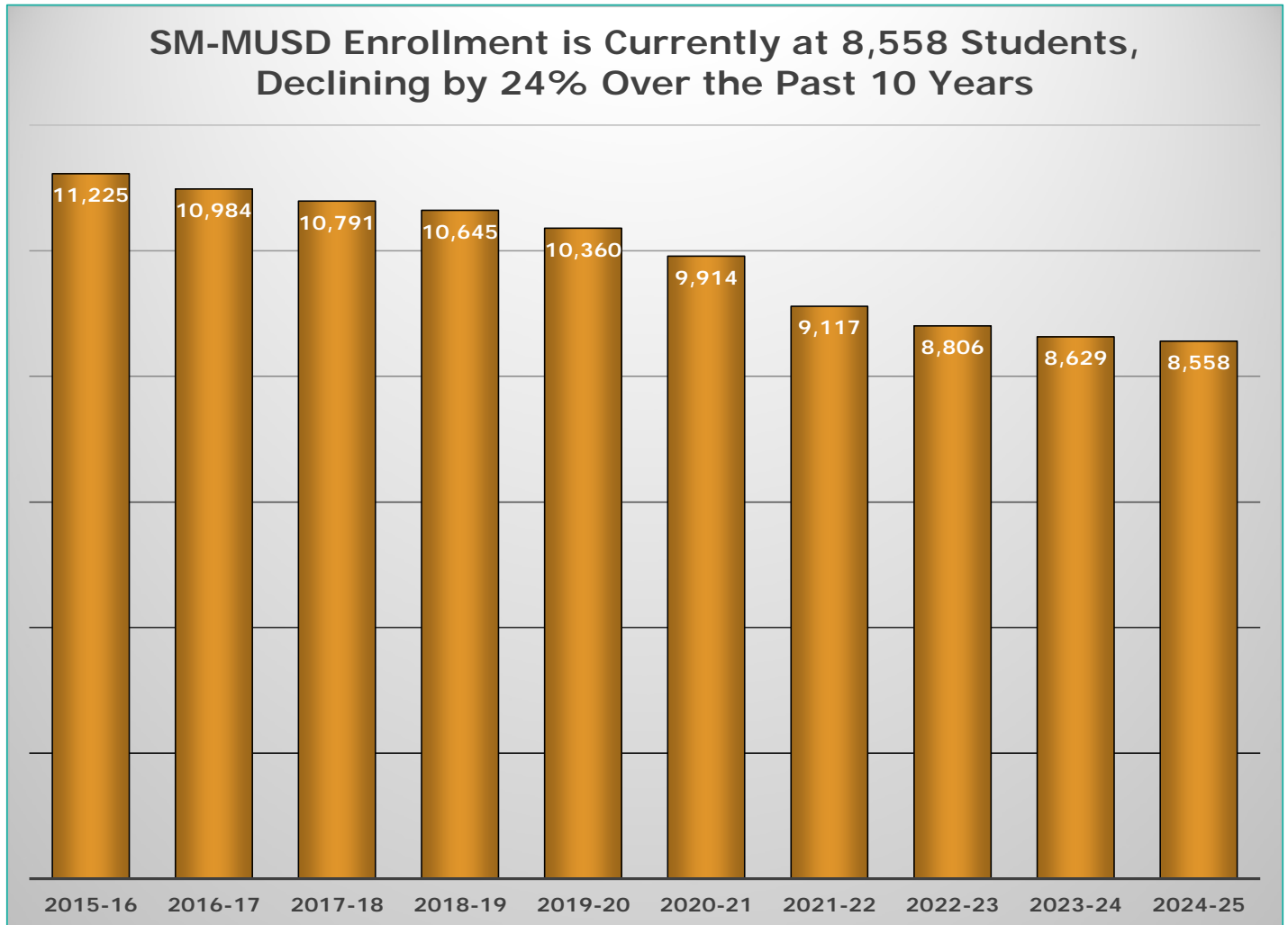
Key Findings:

- Although student enrollment of the proposed MUSD is not expected to meet the threshold of 1,501 students set forth in the California Code of Regulations (CCR), **the proposed MUSD will substantially meet the intent of Criterion #1** because it will not be dependent on either county office of education or state support.
- The projected student enrollment of SMUSD will remain above the 1,501 student threshold.
- Recent Malibu City Council initiatives to increase affordable housing and regulate vacation rentals will likely impact the housing stock available to young families, thereby increasing the number of permanent residents in Malibu and having a positive impact on the student enrollment in Malibu schools.
- The Woolsey Fire in 2018 destroyed 488 homes in Malibu and an additional 397 homes outside of City limits but within the SM-MUSD boundaries (and within the proposed SMUSD boundaries). As these homes are rebuilt, families will come back to Malibu, likely increasing the student population.
- An independent MUSD will likely recover families that have left the district due to dissatisfaction with SM-MUSD. Gaining local control and an increased focus on academics will likely bring students back to Malibu schools and, subsequently, address the Malibu enrollment crisis.

Analysis of Criterion #1:

As shown in **Figure 2**, SM-MUSD has a current enrollment of 8,641 students and has experienced a 20% decline in enrollment over the past 8 years. It is projected that this declining enrollment trend will continue into the future as the student cohorts in the lower grades are smaller than the student cohort in the upper grades, which results in a decline in enrollment.

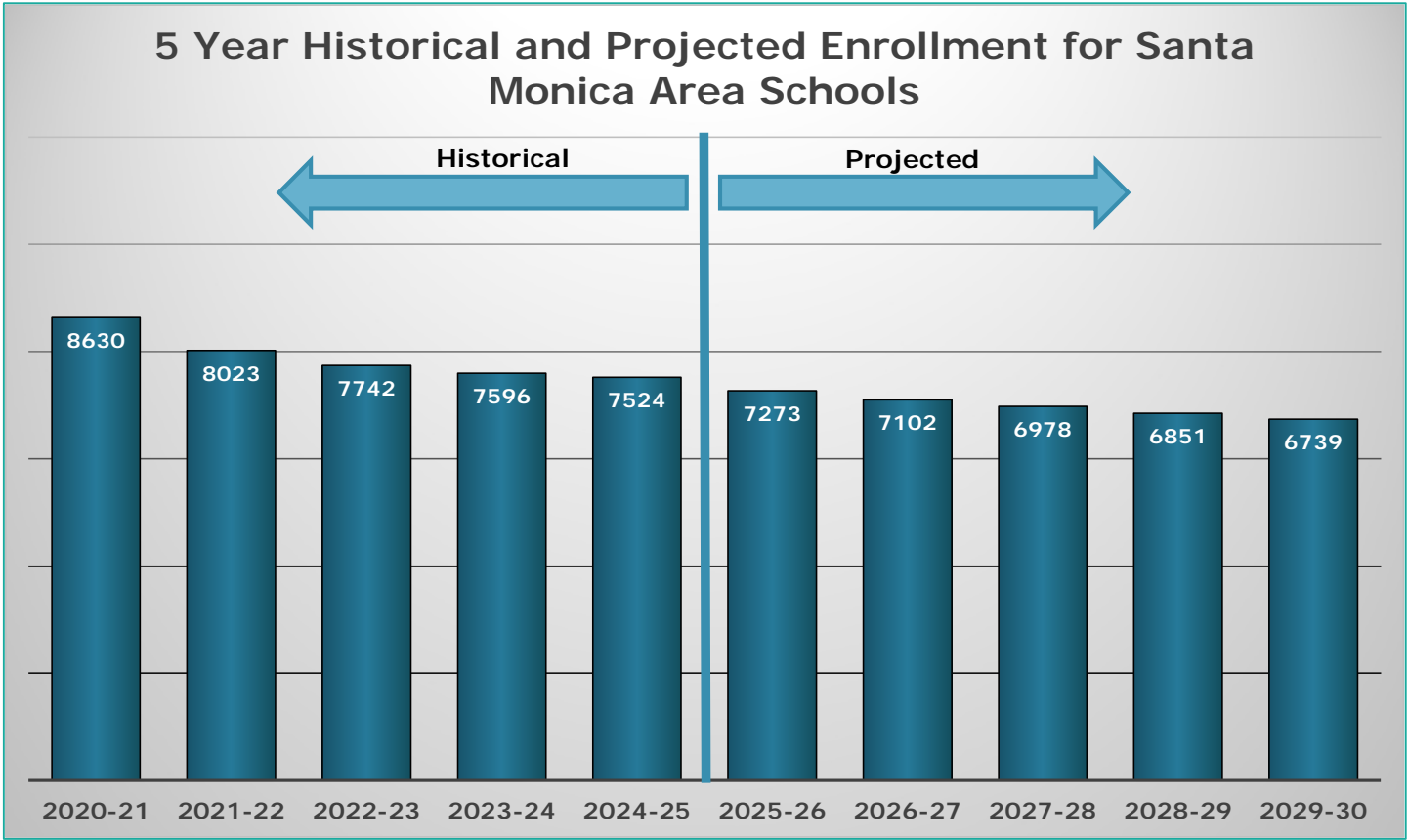
FIGURE 2



Source: California Department of Education, Dataquest, "District Enrollment by Grade (with School Data)" for enrollment data from 2015-16 through 2023-24. SM-MUSD for enrollment data for 2024-25.

If the proposed reorganization occurs, enrollment in the remaining SMUSD would exceed the minimum 1,501 standard, with a current enrollment of 7,524 at the twelve schools located in Santa Monica. Although enrollment is projected to continue to decline, SMUSD would remain above the 1,501 standard, as shown in **Figure 3**.

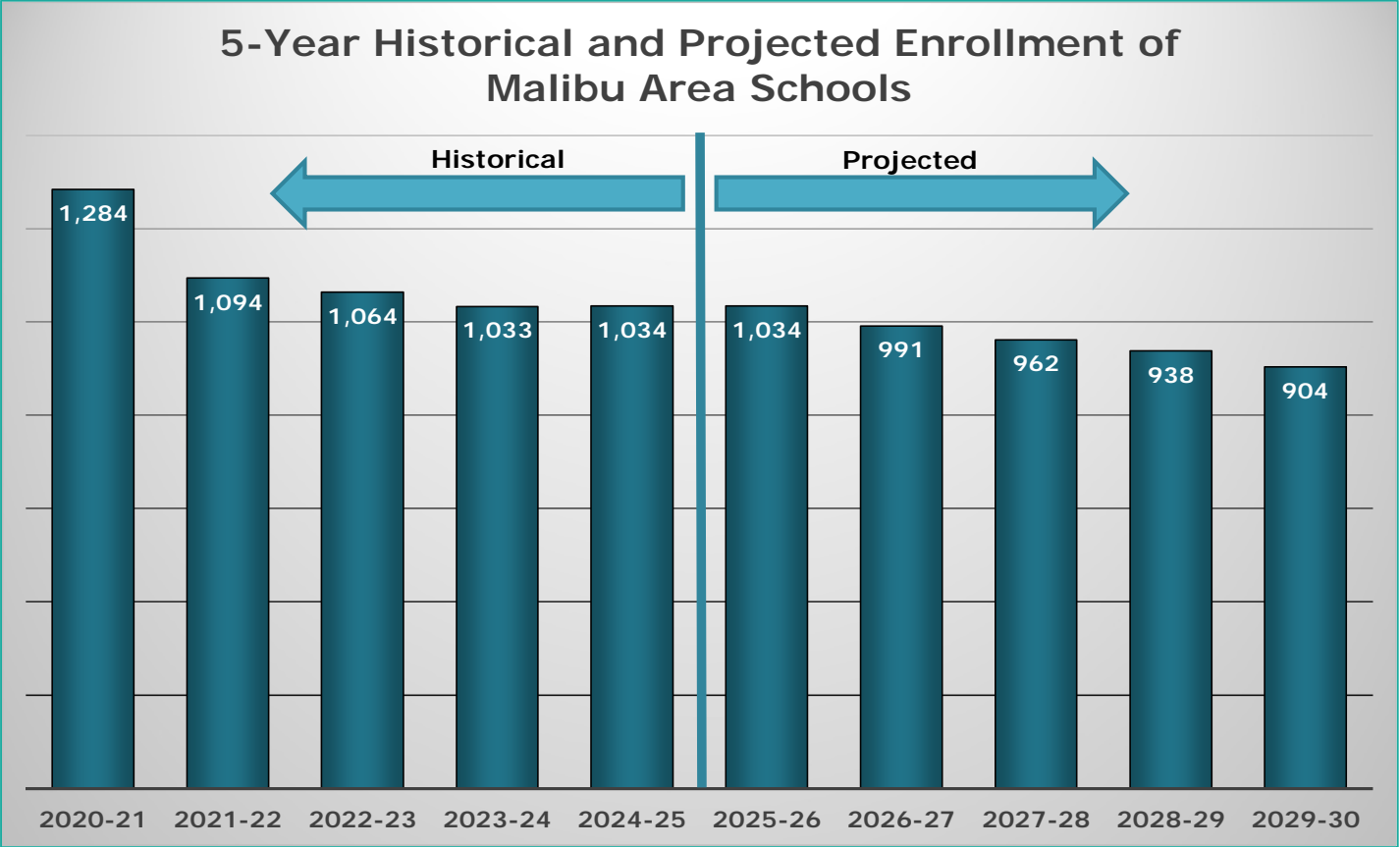
FIGURE 3



Source: California Department of Education, Dataquest, "District Enrollment by Grade (with School Data)" for enrollment data from 2020-21 through 2023-24. SM-MUSD for enrollment data for 2024-25.

If the proposed reorganization occurs, the enrollment in the new MUSD would not likely exceed the minimum 1,501 standard, with a current enrollment of 1,034 at the four schools located in the Malibu area. Enrollment remained essentially the same between 2023-24 and 2024-25. However, based on the cohort survival enrollment projection methodology, enrollment is projected to decline in the Malibu area, as shown in **Figure 4**.

FIGURE 4



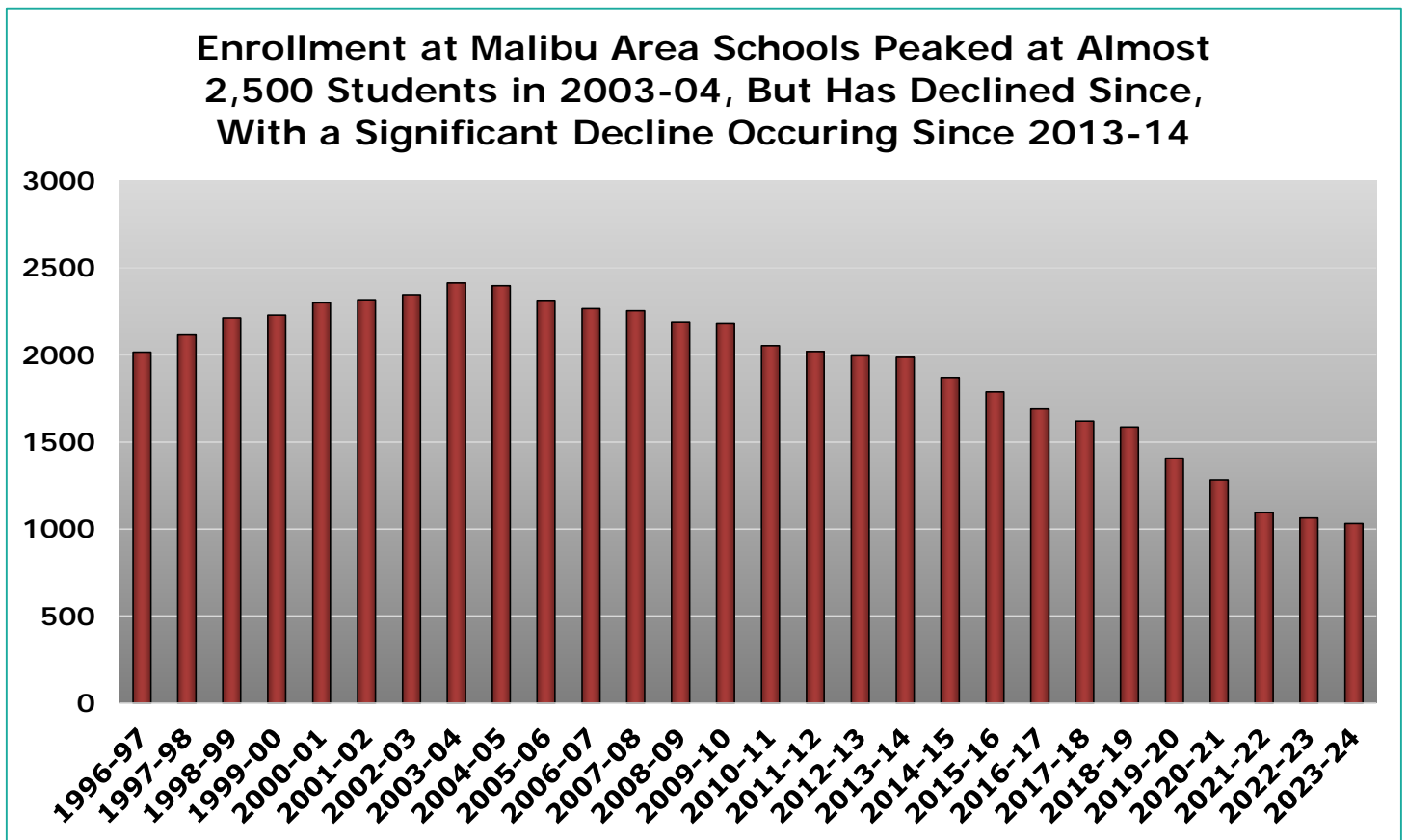
Source: California Department of Education, Dataquest, "District Enrollment by Grade (with School Data)" for enrollment data from 2020-21 through 2023-24. SM-MUSD for enrollment data for 2024-25.

Understanding the Enrollment Loss in the Malibu Area

Since 1995-96, when Malibu High School began to serve students through 12th grade, the community was able to support almost 2,500 students, as shown in **Figure 5**. But several factors have led to the more recent decline in the Malibu area student population, including:

- Declining population in both the Malibu area as well as Los Angeles County and California as a whole
- Loss of almost 900 homes from the Woolsey Fire in 2018
- Affordability of housing for families in the Malibu area
- Utilization of residential units as second homes or vacation rentals instead of primary residences
- Dissatisfaction with SM-MUSD policies and practices, specifically SM-MUSD's response to PCBs found in Malibu schools, educational program offerings, and financial mismanagement.

FIGURE 5



Source: California Department of Education, DataQuest.

City of Malibu Population Decline. Both California, as a whole, and Los Angeles County are experiencing a population decline due to fewer births, less immigration, and pandemic deaths, according to the California Department of Finance. The City of Malibu is also seeing a population decline due to the above listed factors, along with family displacement due to the Woolsey Fire, the high cost of housing, and the use of residential units as second homes or vacation rentals instead of primary residences.

According to the United States Census Bureau "Quick Facts," **the City of Malibu population declined by 15% between 2010 and 2020. However, during that same time frame, the student population in the Malibu area declined by over 40%.** Therefore, it is reasonable to conclude that the population loss in Malibu is only a portion of the driving force behind the significant enrollment decline in Malibu area schools. Hence, the loss of residents due to the Woolsey Fire in 2018 can also explain the population loss in Malibu.

The Woolsey Fire was the largest fire in Los Angeles County history and the most disastrous event ever in Malibu. In one week, the fire burned approximately 90,000 acres throughout the Santa Monica Mountains area and destroyed 488 single-family homes in Malibu and 397 homes within the unincorporated area of Los Angeles County right outside the City limits—all part of the Malibu area to be reorganized out of the existing SM-MUSD boundaries. In total, an estimated 1,075 homes were lost from the Woolsey Fire, 885 of which were within the greater Malibu area. The Malibu community is continuing to rebuild; it is expected that many residents displaced by the Woolsey Fire will return to the Malibu community, bringing back families and students to the schools. For the purposes of this Feasibility Study, no adjustments have been made to account for students returning after rebuilding caused by the Woolsey Fire, but it is an important consideration for the County Committee when evaluating the future student enrollment of Malibu area schools.

City Council Policy Development to Bring Families Back to Malibu. Housing affordability is another likely factor contributing to the loss of enrollment in Malibu area schools. Especially in coastal cities, housing that is available to low- and moderate-income families is hard to come by. As such, families with school-aged children may not have the means to live in Malibu, thus contributing to the student enrollment decline.

Recognizing the need to encourage families to move back to the area, the Malibu City Council has been active in setting policies to create affordable housing. On January 10, 2022, the Malibu City Council held a public hearing on a draft of the General Plan Housing Element Update that establishes and implements specific goals, policies, and objectives relative to the provision of housing for all income levels. The City Council adopted the Update.

To further demonstrate the City Council's policy to encourage the development of affordable housing, in November of 2021, the City executed an \$18 million agreement with the California Department of Housing and Community Development to help fund multi-family housing projects that meet federal objectives for increasing available low- and moderate-income housing.

Additionally, the City Council has developed significant regulations for short-term rentals in part to increase the availability of housing available to residents. In November 2020, the City Council adopted an ordinance to establish provisions to regulate short-term rentals including a primary residency requirement which went into effect on January 15, 2021.

These active changes to affordable housing and short-term rental policies are aimed at increasing the number of families and permanent residents within Malibu, likely resulting in an increase in the student population. For the purposes of this Feasibility Study, no adjustments have been made to account for recent changes to City housing policies, but it is an important consideration for the County Committee when evaluating the future student enrollment of Malibu area schools.

Dissatisfaction with SM-MUSD. Finally, another driving force behind the student population decline in the Malibu area is a community-wide dissatisfaction with the policies and decision-making of the Santa Monica-focused governance and leadership of SM-MUSD. As a result, dissatisfied Malibu families have had to abandon public schools and instead enroll in private and charter schools.

As a Basic Aid district, SM-MUSD does not have any incentive to address the decline in enrollment in Malibu schools because it will continue to receive the same amount of property taxes from Malibu regardless of enrollment. Further, the significant enrollment loss in the Malibu area is only a small portion of the overall SM-MUSD enrollment. It does not rise to a level of concern for the SM-MUSD leadership. Without action from the County Committee to enable the creation of a new MUSD, this enrollment crisis will continue. For the purposes of this Feasibility Study, no adjustments have been made to account for the expected increase in enrollment when dissatisfied parents who have opted for private and charter schools return to the new MUSD, but it is an important consideration for the County Committee when evaluating the future student enrollment of Malibu area schools.

Intent of Feasibility Criterion #1

Education Code section 35753(a)(1) does not specify what is meant by “adequate in terms of the number of pupils enrolled.” However, pursuant to the statutory mandate, the State Board adopted regulations to serve as guidelines for determining whether each district affected by the proposed reorganization complies with each criterion. As to the enrollment criteria, the adopted regulations indicate each district affected should have a projected enrollment number as of the effective date of the reorganization. Specifically, a unified district shall have a projected enrollment of 1,501. The guidelines also clearly state the intent behind the enrollment criterion is to avoid establishing direct service districts that become more dependent upon county offices of education and state support.

Furthermore, the California Department of Education (CDE) states in their School District Organization Handbook (see **Figure 6** for a screenshot of Chapter 6, page 10 of the CDE Handbook) that in sparsely populated areas, it is often difficult to meet the enrollment thresholds, and the State Board of Education has considered facts such as distance, weather conditions, geography, and topography in deciding “whether to waive the size condition.”

FIGURE 6

audit reports completed by independent auditors.

C. Exceptional Situations

In considering proposals for unification, the State Board of Education must determine whether the conditions in *EC* Section 35753(a) are substantially met. However, subdivision (b) of that section of the law also gives the State Board of Education the authority to depart from the conditions under certain conditions. Specifically, the board may determine that it is not practical to apply the conditions literally and that an exceptional situation exists that warrants approval of the proposal.

CCR, Title 5, Section 18573, states that the minimum size for a unified school district is supposed to be 1,501 students. In sparsely populated areas, however, it is often difficult to reach that number of students. The State Board of Education has considered such factors as distance, weather conditions, geography, and topography in deciding whether to waive the size condition.

D. Comparison of Statutory and Regulatory Requirements

Source: California Department of Education School District Organization Handbook, Chapter 6, Page 10.

In *Fullerton Joint Union High School Dist. v. State Board of Education*, the State Board of Education and the county committee found the district substantially met criterion one concerning adequate enrollment when the projected enrollment fell far below the guideline threshold. It was explained that “[a]lthough the projected enrollment is less than specified in the guidelines... the relatively low enrollment should not deprive ...area residents of the opportunity to form a unified school district.” Fullerton JUHSD had a projected enrollment of approximately 3,100 when, at that time, the guidelines set minimum enrollment at 5,000, roughly a 40% deficit. The Supreme Court of California reinforced the State Board of Education’s determination that the Fullerton JUHSD substantially met the enrollment criteria despite a proposed enrollment deficiency.

The projected student enrollment of SMUSD will remain above the 1,501-student threshold, meeting this criterion. The projected student enrollment of MUSD is approximately 1,000, roughly a 33% deficit to the current 1,501 enrollment threshold. More significantly and directly on point with the express intent of the law, the proposed MUSD would operate as a basic aid district and have sufficient funding to not depend on the County Office of Education or the State for administrative or financial support.

The slight enrollment deficit of the proposed MUSD, which is less than what was found to substantially meet this criterion in *Fullerton*, in conjunction with its financial self-sufficiency as a basic aid district, should be sufficient to show it substantially meets the intent explicitly identified in 5 CCR § 18573(a)(1) as to Criteria #1. Furthermore, when other factors (acknowledged by both CDE and SBE), such as but not limited to Malibu’s distance from the rest of SM-MUSD, its unique geographical location, and its overall low-density population are included in the determination, there is significant evidence to show MUSD substantially meets Criterion #1. Therefore, the somewhat low enrollment should not deprive Malibu residents of the opportunity to form MUSD.

Ability to Meet Feasibility Criterion #1:

The proposed SMUSD’s enrollment is projected to be significantly above the 1,501 student threshold. Although the proposed MUSD would not specifically meet the enrollment threshold set forth in Criterion #1, with its anticipated high per pupil funding amount, the lower enrollment will not result

in a dependence on the county office of education or the State. Therefore, it is reasonable to expect that Criterion #1 can be substantially met based on the legislative intent stated in the CCR.

CRITERION #2: COMMUNITY IDENTITY

Education Code Section 35753(a)(2):

The districts are each organized on the basis of a substantial community identity.

California Code of Regulations, Title 5, Section 18573(a)(2):

To determine whether the new district is organized on the basis of substantial community identity, the State Board of Education will consider the following criteria:

- Isolation
- Geography
- Distance between social centers
- Distance between school centers
- Topography
- Weather
- Community, school, and social ties, and other circumstances distinctive about the area.

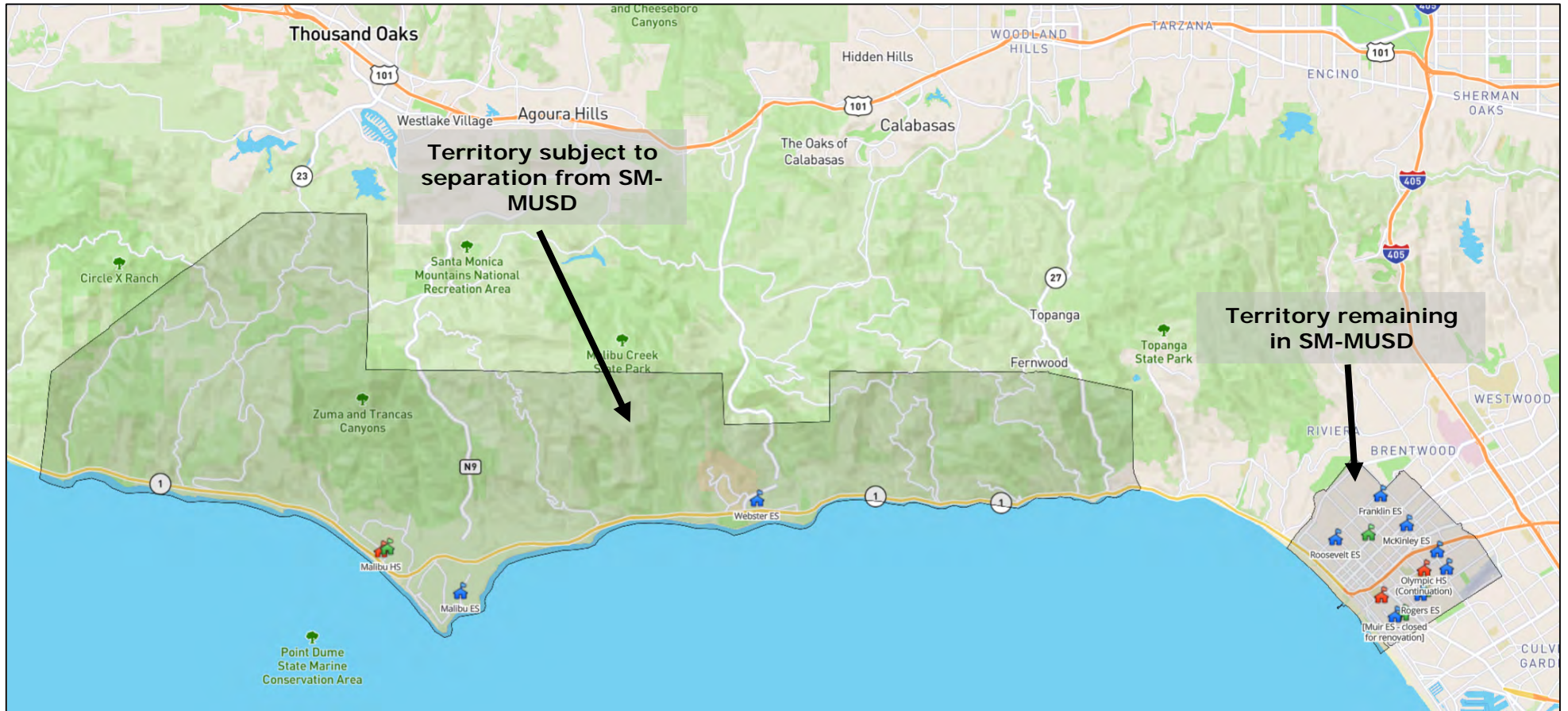
CDE Handbook on Community Identity:

In addition to the Education Code and CCR, the CDE Handbook further expands on how this criterion should be evaluated to determine whether a proposed reorganization meets the community identity criterion. These indicators include: "types of housing, park and recreation facilities and programs, sports activities, transportation patterns, geopolitical factors, and shopping patterns."

Key Findings:

- Santa Monica and Malibu are two geographically distinct communities with their own character and identity as exemplified in the results of a community identity survey.
- There is a strong community identity within the Malibu geography of the District.
 - Malibu residents have similar shopping and traffic patterns, share a similar opinion on the strengths and weaknesses of the Malibu community, and demonstrate strong social ties within the Malibu area.
 - Further, the Malibu residents see their community as rural with a distinct housing type.
- Similarly, there is a strong community identity within the Santa Monica geography of the District.
 - There are similarities among the various Santa Monica communities with regards to shopping patterns, traffic, recreation, and social centers.
 - Santa Monica residents see their community as urban with housing becoming more high-density since the City is completely built-out.
- School-site attendance boundaries and pathways would not change as a result of this proposed reorganization, keeping existing school communities intact.

FIGURE 7
EXISTING SM-MUSD BOUNDARIES



Analysis of Criterion #2:

The petition submitted by the City of Malibu is for the formation of a new MUSD. The boundary for the proposed MUSD would encompass the entire City of Malibu and would include portions of neighboring unincorporated Los Angeles County, as shown in **Figure 8**. The area is **not contiguous** with the remainder of SMUSD, as shown in **Figure 7**.

The City of Malibu is a rural community located on the edge of Los Angeles County on the coastline, bordered by the Cities of Los Angeles and Pacific Palisades and unincorporated land within the County of Los Angeles. Malibu is approximately 20 square miles and has a low population density; residents are within several miles of schools, shopping, parks, and major transportation routes.

FIGURE 8
MUSD PROPOSED BOUNDARIES



Similarly, with the proposed reorganization, the new SMUSD's boundaries would encompass the entire City of Santa Monica, as shown in **Figure 9**. The City of Santa Monica is a densely populated urban area that is approximately 8.5 square miles of land located on the western edge of the County of Los Angeles. Residents of Santa Monica are within a few miles of schools, shopping, parks, and major transportation routes.

FIGURE 9
SMUSD PROPOSED BOUNDARIES



When Malibu and Santa Monica were joined together more than 70 years ago, it was a matter of convenience due to the rural and minimal population of the Malibu area. But over time, both communities have grown and changed in dramatically different ways. The synergies that were once present are simply non-existent today.

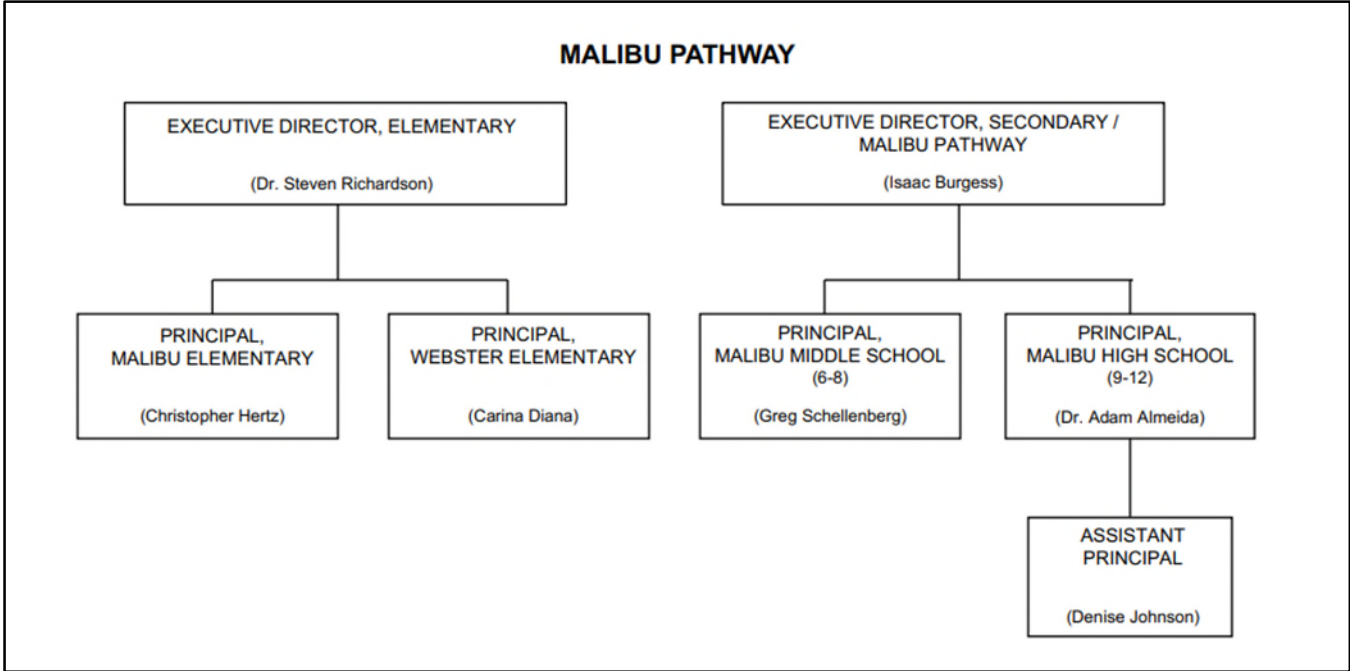
As stated in the City of Malibu Vision Statement:

"Malibu is a unique land and marine environment and residential community whose citizens have historically evidenced a commitment to sacrifice urban and suburban conveniences in order to protect that environment and lifestyle, and to preserve unaltered natural resources and rural characteristics. The people of Malibu are a responsible custodian of the area's natural resources for present and future generations."

This is in stark contrast to Santa Monica, an urban city focused on attracting businesses and tourists to bolster the local economy.

The two communities operate completely separately from each other, even in the school system. SM-MUSD has created three pathways for students – John Adams Pathway, Lincoln Pathway, and Malibu Pathway – based on the school site attendance boundaries for elementary schools and middle schools. As shown in the organization chart for the Malibu Pathway (**Figure 10**), the Malibu schools operate completely independently from any Santa Monica schools. Students living in Malibu do not typically attend schools or activities in Santa Monica due to driving distance and hazards of Pacific Coast Highway (PCH) nor do students in Santa Monica attend schools or activities in Malibu.

FIGURE 10



Source: Santa Monica-Malibu Unified School District, Organization Charts, page 24, November 2024.

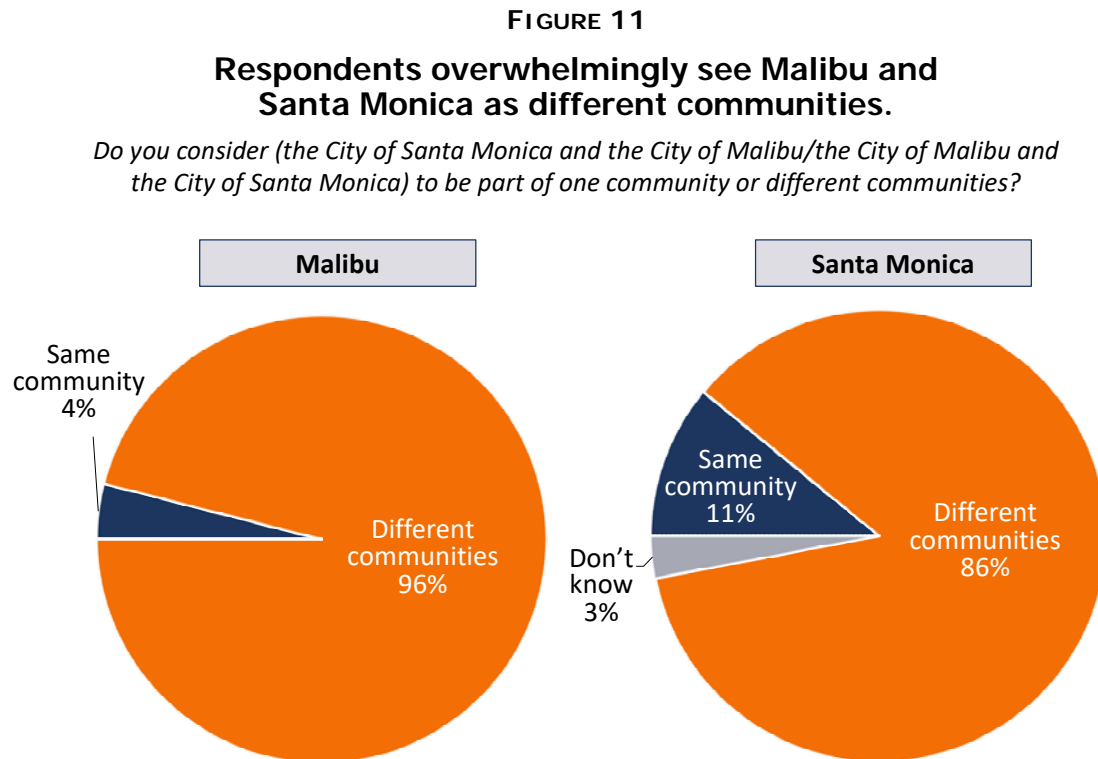
Community Identity Survey

The City of Malibu feels instinctively that an independent MUSD should be formed on the basis of a substantial community identity, as required by the Education Code. Yet, to document this for the County Committee, the City of Malibu engaged FM3 Research (a firm specializing in researching issues related to public agencies through written surveys, focus groups, and one-on-one interviews) to better understand the sentiment of both Malibu and Santa Monica residents on this matter. The lead consultant from FM3 Research, Dr. Richard Bernard, is one of California’s foremost public opinion researchers and has extensive experience examining resident satisfaction with local government services, as well as branding and marketing research for public agencies.

Through the expertise of Dr. Bernard and FM3 Research, the City conducted a community identity survey to obtain qualitative data from residents in both Malibu and Santa Monica related to how residents view their own community and whether they have a direct community association with the other community. The online survey gathered data from a random sample of 100 Malibu registered voters and 300 Santa Monica registered voters. The survey addressed the indicators specifically

identified in the CCR and the CDE Handbook related to Criterion #2. The results of the survey will be included in the discussion below on each of the CDE identified indicators.

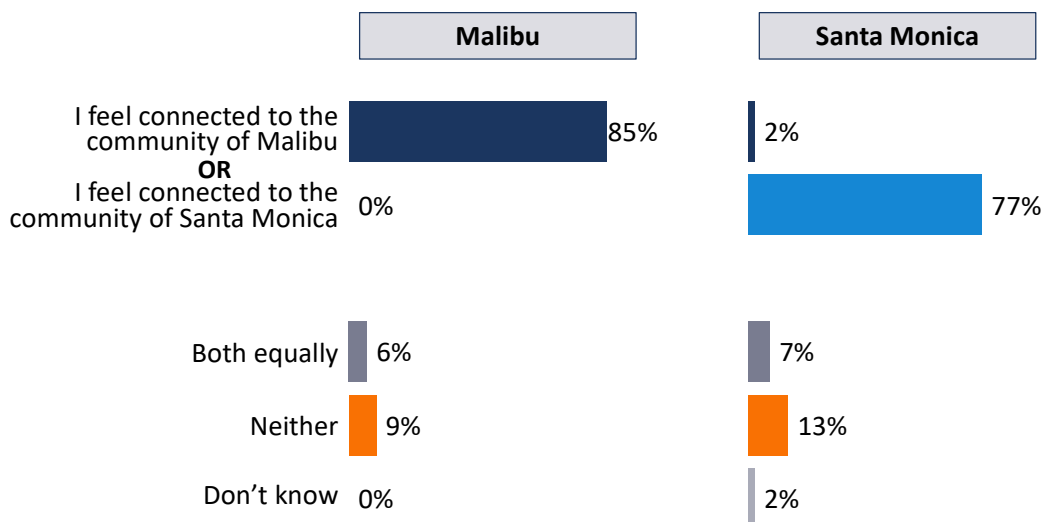
Distinct Communities. Overall, survey respondents overwhelmingly see Malibu and Santa Monica as different communities, with 96% of Malibu residents and 86% of Santa Monica residents seeing the communities as being different (**Figure 11**).



Expanding on the sentiment of residents of each city, respondents were asked whether they feel connected to Malibu or Santa Monica. The survey demonstrated that most respondents feel connected to the community in which they reside. (**Figure 12**)

FIGURE 12

Most respondents feel connected to the community in which they reside.

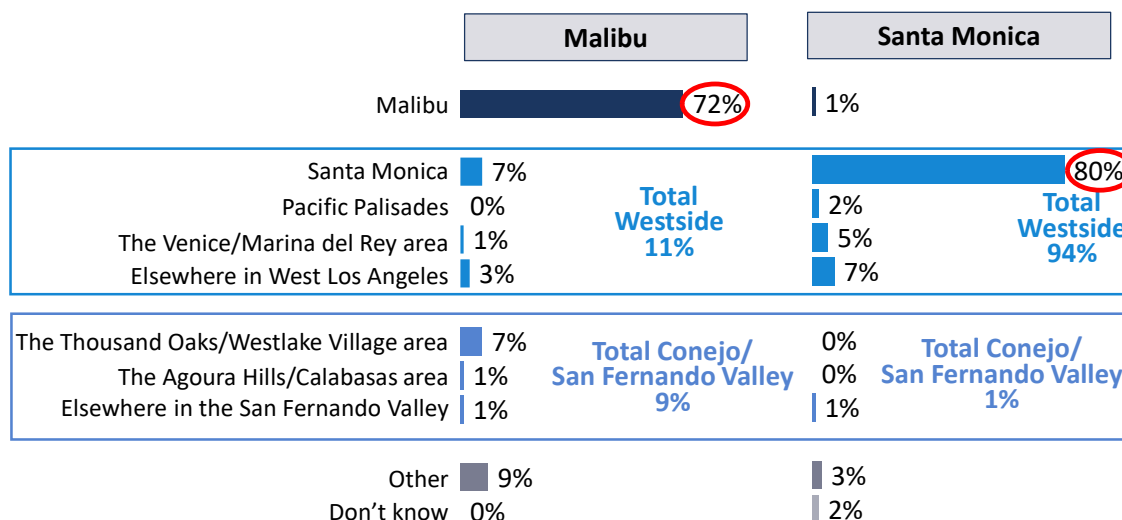


When considering where respondents spend most of their free time, Malibu and Santa Monica residents primarily socialize in their own cities. (**Figure 13**) Residents very rarely socialize in the other city, again demonstrating that there is little commonality between the two communities.

FIGURE 13

Malibu and Santa Monica respondents primarily socialize in their own cities; virtually none of the Santa Monica respondents do so in Malibu.

Where would you say most of your social life takes place?



Dissimilar Housing and Development. According to the CDE Handbook, “similarity of architecture, size, and style of homes can create a sense of community identity.” As described in the City of Malibu’s General Plan Housing Element, Malibu is primarily a residential community consisting of

beachfront residential lots and large lots in the hillsides and canyons overlooking the ocean. Some multi-family development and neighborhood/visitor-service commercial development is located in the flatter portions of the City along PCH. The City has a highly scenic rural character that it passionately endeavors to preserve. Development within the City is constrained by numerous land features including steep slopes, environmentally sensitive habitat areas, geologic instability, flood hazards, and extreme wildfire hazards. Because of these constraints, a large portion of the City remains undeveloped and rural in character. Growth is also limited by the lack of a centralized sewer system.

The City of Malibu is comprised of nearly 20 square miles with 10,600 residents. This equates to 530 people per square mile, a relatively low population density. As shown in **Figure 14**, beyond the large and high-value beachfront homes that many believe make up Malibu, most Malibu neighborhoods are rustic chaparral with homes built within the canyons. Homes are located quite a distance from the many conveniences that residents in more suburban and urban communities expect.

FIGURE 14



In contrast, the City of Santa Monica's General Plan Housing Element describes Santa Monica as a community with rapid growth spurred by industry. By the mid-1960s, most land in Santa Monica was developed, but growth has continued to occur in the City due to "recycling lower-intensity land uses to higher-density uses." The City of Santa Monica estimates a current housing stock of 52,269 units within the 8.3 square miles of land within the City. With 93,000 residents, which equates to 11,200 people per square mile, one of the most densely populated urban areas in the State. **Figure 15** provides images of typical Santa Monica neighborhoods.

FIGURE 15



The City of Santa Monica is finding itself in the midst of overcrowding due to the high cost of housing and number of local businesses and jobs. In order to live in Santa Monica, near employment centers, more people are occupying residences than such housing was built for, with more than one person per room. According to the City's General Plan, approximately 80,000 non-resident workers commute into Santa Monica. As shown in **Figure 16**, Santa Monica also has a vibrant downtown with several businesses and nightlife. This is simply not present in Malibu.

FIGURE 16

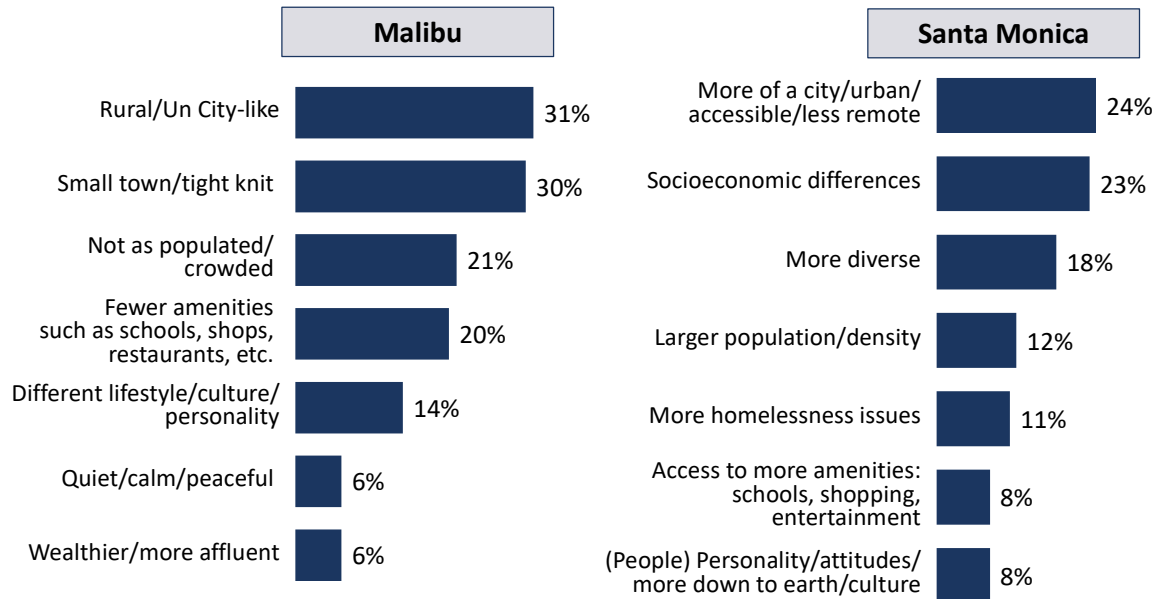


Different Community Characteristics. Residents surveyed agree that Malibu and Santa Monica differ as communities in their rural/small town versus urban/city feel (**Figure 17**). Respondents see Malibu as a rural community with a small town/tight-knit feel. The Malibu area has fewer amenities and a different lifestyle, culture, and personality than the larger and denser Santa Monica. Respondents feel that Santa Monica has more socioeconomic differences from Malibu with its urban and more accessible location. They also believe Santa Monica to be more diverse with a larger population density facing challenges such as homelessness.

FIGURE 17

Most respondents say that Malibu and Santa Monica differ as communities in their rural/small town versus urban/City feel.

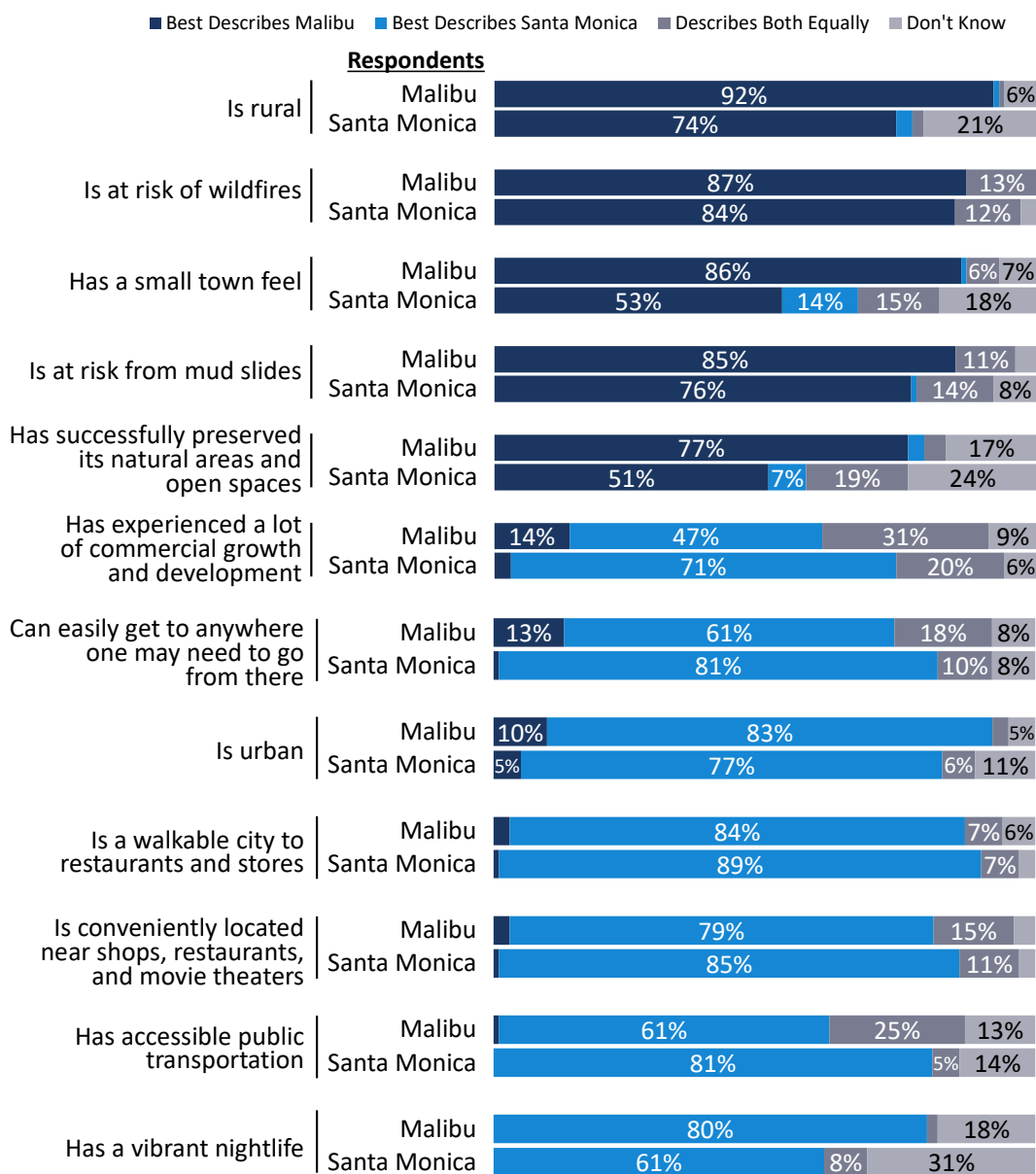
(Open-Ended Question; Responses Grouped; Top Responses Shown)



Respondents overwhelmingly associate different traits with Malibu and Santa Monica identifying risk of wildfire and mud slides in Malibu, and identifying commercial growth and development as well as convenience and accessibility in Santa Monica. **(Figure 18)**

FIGURE 18

Respondents overwhelmingly associate different traits with Malibu and Santa Monica.



The responses to the survey demonstrate the stark differences between Malibu and Santa Monica, but also show that each community is united in how it sees its own area. This demonstrates the strong community identity within the Malibu area separate from the community identity of the Santa Monica area.

Park and Recreation Facility and Programs and Sports Activities. According to the CDE Handbook, “the usage patterns of parks and school facilities for recreation programs and sports activities for youth can indicate a community identity.” Residents in Malibu use their area facilities for recreation and sports activities while Santa Monica residents use their area facilities. There is

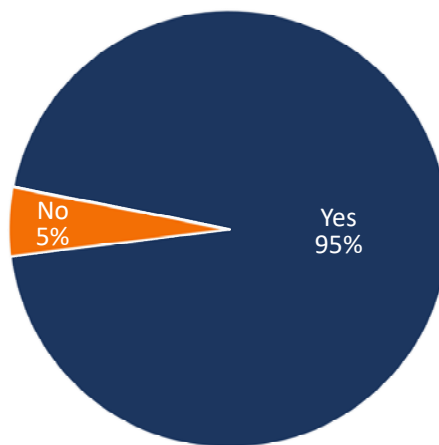
almost no crossover utilization of recreational facilities in the other community. Nearly all Santa Monica respondents with children in organized recreational sports say their children practice in Santa Monica, and of the 5% that do not practice in Santa Monica, 0% indicated that they practice in Malibu. (**Figure 19**)

FIGURE 19

Nearly all Santa Monica respondents with children in organized recreational sports say their children practice in Santa Monica.

Would you say your child or children primarily have practice for their organized recreational youth sports in Santa Monica?

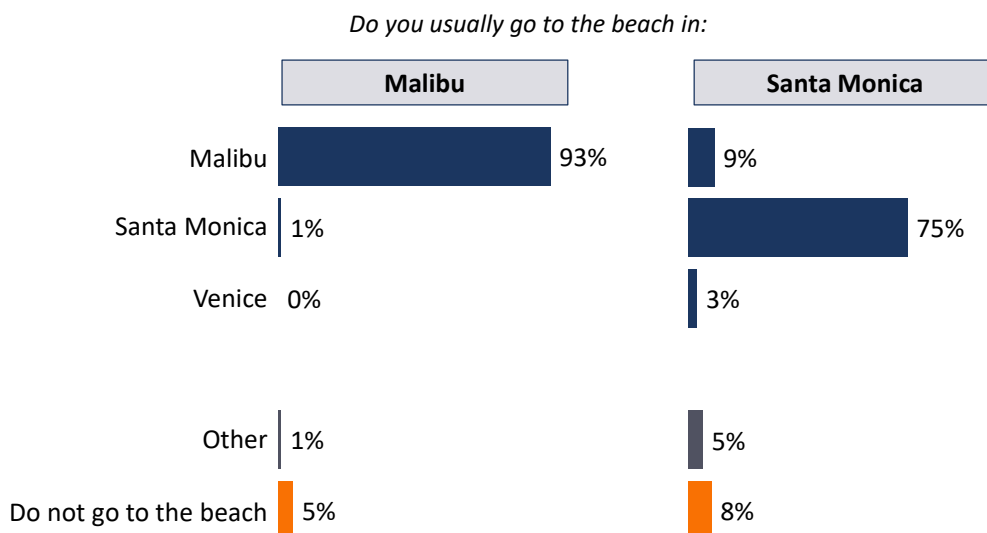
*(Asked Only of Those Who With Children Under 19 Who Participate in Organized Recreational Youth Sports)
(Santa Monica Respondents Shown, n=22)*



This same community separation holds true with other types of recreation, including going to the beach. Over 9 in 10 Malibu respondents usually go to the beach in Malibu and 3 out of 4 Santa Monica respondents usually do so in their own city. (**Figure 20**)

FIGURE 20

Over 9 in 10 Malibu respondents usually go to the beach in Malibu; 3 out of 4 Santa Monica respondents usually do so in their own city.



These communities simply operate separately when it comes to youth sports and recreation although each community has its own strong community identity for recreation and youth sports.

Transportation Patterns. The CDE Handbook indicates that “traffic patterns and public transportation systems and routes may have an impact on community identity.” To get a better idea of the roads traveled by Malibu residents as compared to Santa Monica residents, FM3 Research asked respondents how often they used various roads, highways, or freeways located in and around both Malibu and Santa Monica.

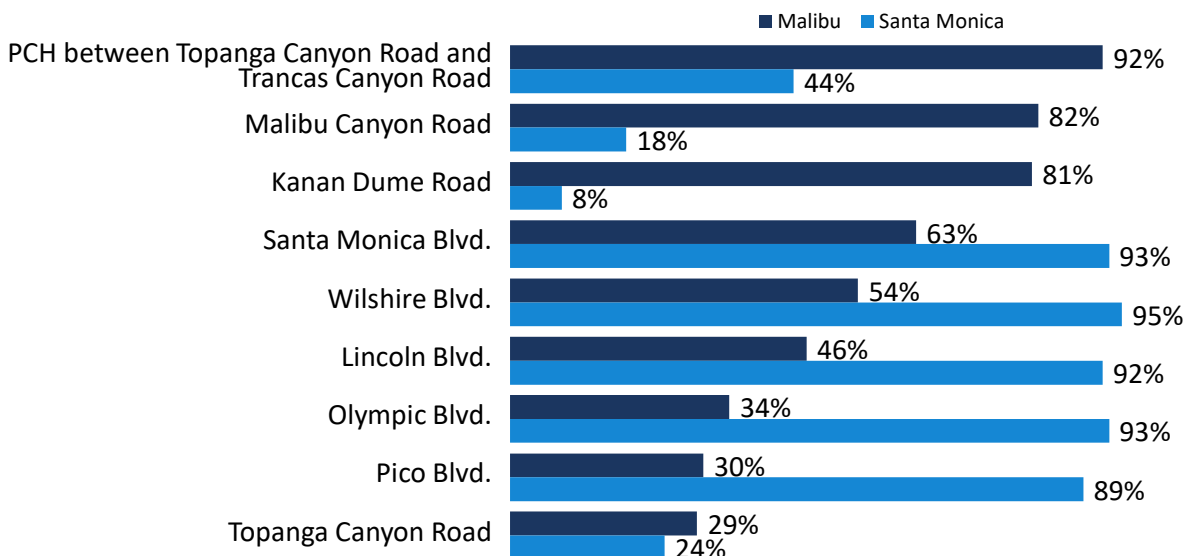
There is a clear difference in the roads Malibu and Santa Monica respondents use in their daily lives, as expected due to the distance between these two cities. (**Figure 21**) Malibu residents predominately travel on PCH, between Topanga Canyon Road and Trancas Canyon Road, on Malibu Canyon Road, and on Kanan Dume Road. Santa Monica residents predominately travel on Santa Monica Boulevard, Wilshire Boulevard, Lincoln Boulevard, Olympic Boulevard, and Pico Boulevard. Most notably, neither Malibu nor Santa Monica share any of these streets in common.

FIGURE 21

There is a clear difference in the roads Malibu and Santa Monica respondents use in their daily lives.

*In your daily life, how often do you use the following roads, highways, or freeways?
Do you use them often, sometimes, rarely, or never?*

(Ranked by Total Often/Sometimes by Malibu Respondents)



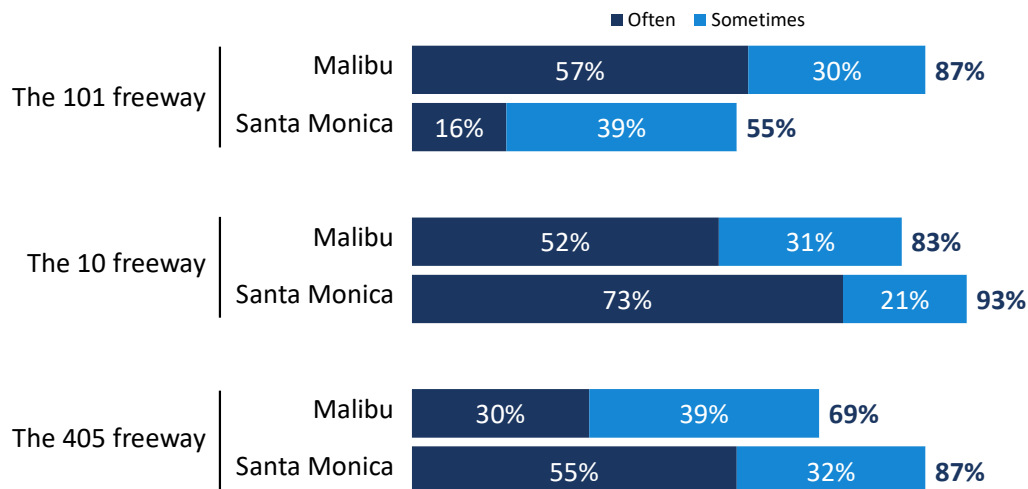
In addition to their divergent local street patterns, these two communities likewise use different highways/freeways in their daily lives. (**Figure 22**) This further demonstrates the separation between Malibu and Santa Monica. Malibu respondents are far more likely to use the 101 Freeway than Santa Monica respondents. Santa Monica respondents use the 10 and 405 Freeways more often.

FIGURE 22

Malibu respondents are far more likely to use the 101 Freeway than are Santa Monica respondents; Santa Monica respondents use the 10 and 405 more often.

*In your daily life, how often do you use the following roads, highways, or freeways?
Do you use them often, sometimes, rarely, or never?*

(Ranked by Total Often/Sometimes by Malibu Respondents)



Overall, there are vastly different traffic patterns between the two communities. But there are similarities within each community demonstrating that there are strong community ties within Malibu and within Santa Monica.

Geopolitical Factors. The CDE Handbook states that “geopolitical factors such as topography and city council, county supervisor, and special district electoral districts might also create a sense of community among the citizens of an area.” In addition to local governance by two separate city councils, Malibu and Santa Monica have different emergency service providers for both police and fire. Malibu is served by the Los Angeles County Sheriff’s Department and the Los Angeles County Fire Department, while Santa Monica is served by its own police and fire department.

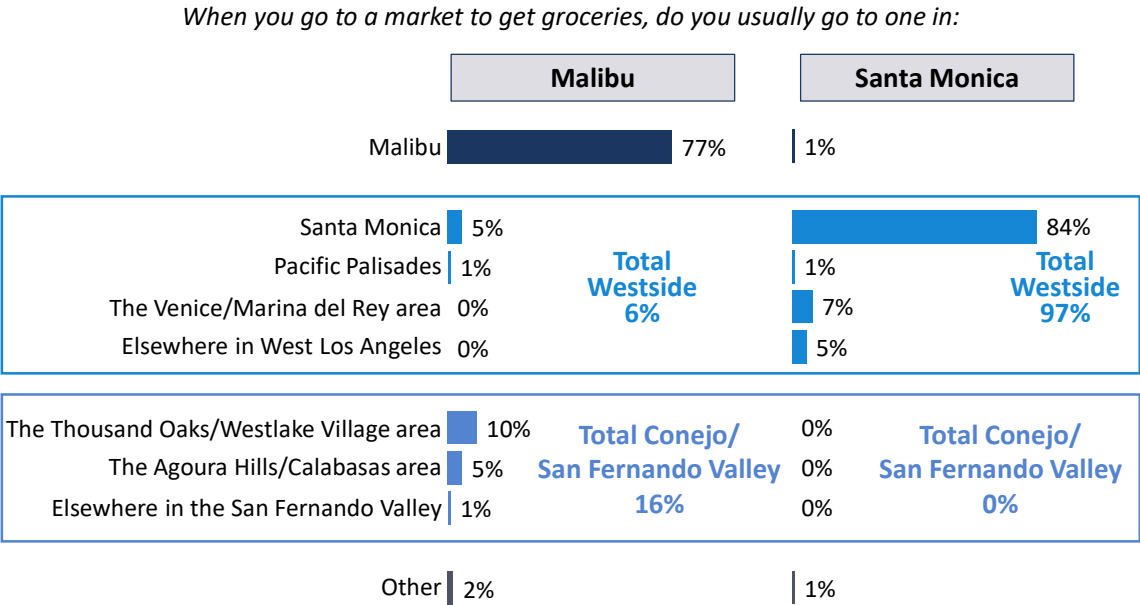
The State and County recently completed redistricting and, as part of that process, identified communities of interest that should be together for the purpose of political representation. The City of Malibu is part of the Las Virgenes-Malibu Council of Governments (COG). The COG includes the cities of Agoura Hills, Calabasas, Hidden Hills, Malibu, and Westlake Village. During the redistricting process, these cities formally submitted letters indicating that they should be in the same Assembly, Senate, and Congressional districts. The COG was formed because these five cities are geographically situated, which allows them to address shared environmental, transportation, and public safety concerns. It is notable that Santa Monica is not included in this COG, further demonstrating the separate community identity of Malibu and Santa Monica.

Further, the communities of Malibu and Santa Monica have separate Chambers of Commerce, service clubs, and other organizations. Other than the school district, the two communities do not share other community-based groups or organizations.

Shopping Patterns. The CDE Handbook indicates that “neighborhood and regional shopping patterns are often well defined and play a part in the way people see themselves.” As with the other factors considered as part of the determination of community identity, the shopping patterns of Malibu and Santa Monica residents are substantially different.

Residents were surveyed about both their neighborhood and regional shopping patterns. As it relates to grocery shopping, Malibu respondents grocery shop in Malibu or in Conejo/San Fernando Valley, while Santa Monica respondents shop nearly exclusively on the Westside. (**Figure 23**)

FIGURE 23
Malibu respondents grocery shop in Malibu or in Conejo/San Fernando Valley; Santa Monica respondents nearly exclusively on the Westside.



When considering larger, more regional retail shopping patterns, residents from Malibu shop in one location and residents in Santa Monica shop in another. This further confirms the strong community identity of each respective community and reinforces that these two areas do not have a common community identity.

Nearly all Malibu residents go to Westlake Village to shop at Costco, while nearly all Santa Monica respondents do so in Marina del Rey. (**Figure 24**) Malibu and Santa Monica residents also go in opposite directions to go to Home Depot or Lowes. (**Figure 25**)

When going to a regional shopping mall, just two in ten Malibu residents usually go retail shopping on the Westside as compared to eight in ten Santa Monica residents (**Figure 26**). When going to a movie theater three out of every four Malibu respondents go to Westlake Village for a movie theater rather than going to Santa Monica or elsewhere on the Westside, despite being of a similar distance. (**Figure 27**)

FIGURE 24

Nearly all Malibu respondents go to Westlake Village to shop at Costco, while nearly all Santa Monica respondents do so in Marina del Rey.

When you go to Costco, do you usually go to one in:

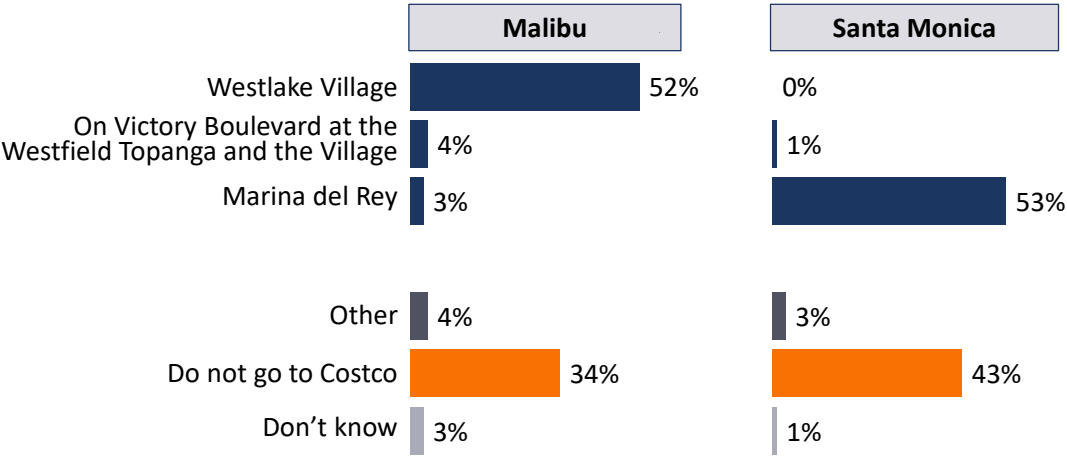


FIGURE 25

Malibu and Santa Monica respondents go in opposite directions to visit Home Depot or Lowes.

When you go to Home Depot or Lowes, do you usually go to one in:

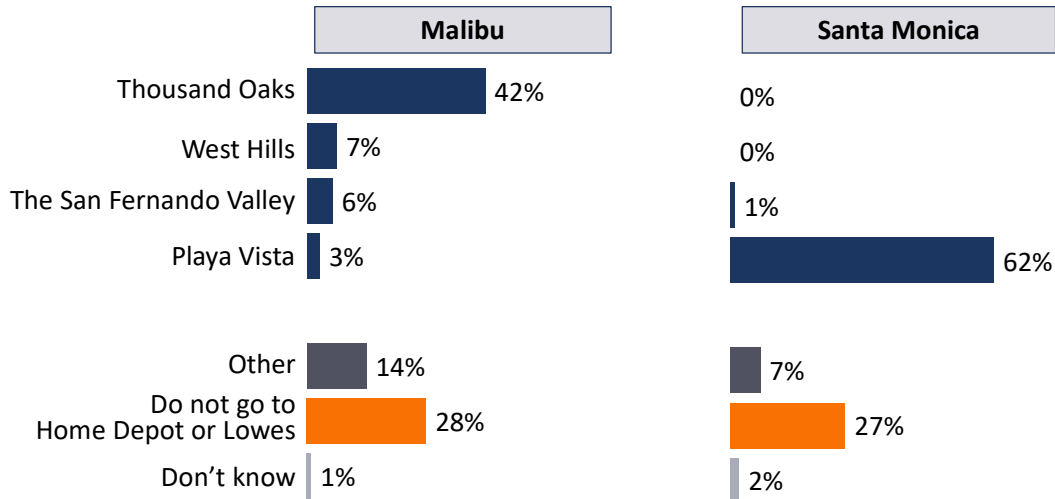


FIGURE 26

Just 2 in 10 Malibu respondents usually go retail shopping on the Westside, compared to 8 in 10 Santa Monica respondents.

When you go to a shopping mall or area to shop for clothes or other retail items, do you usually shop in:

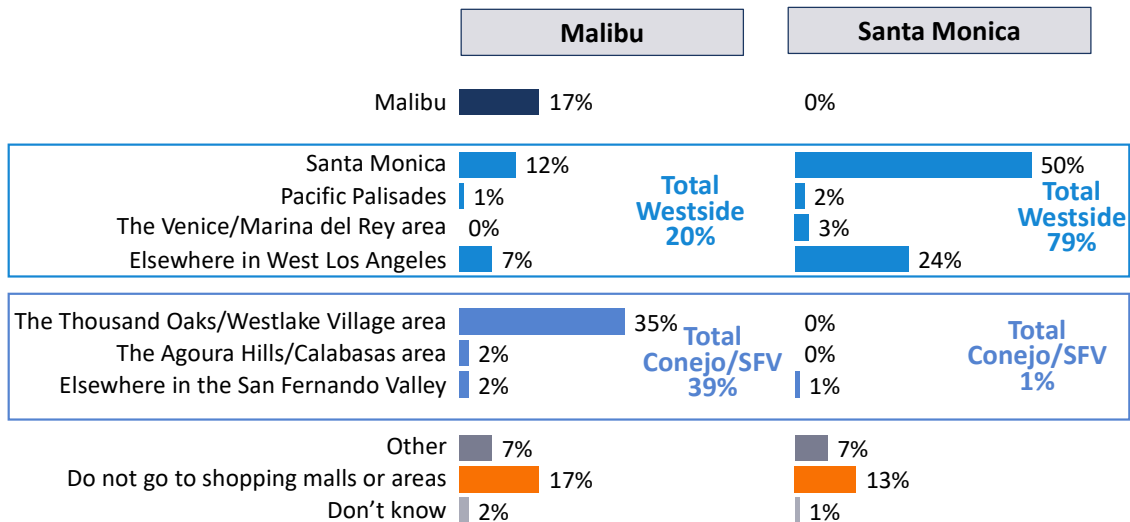
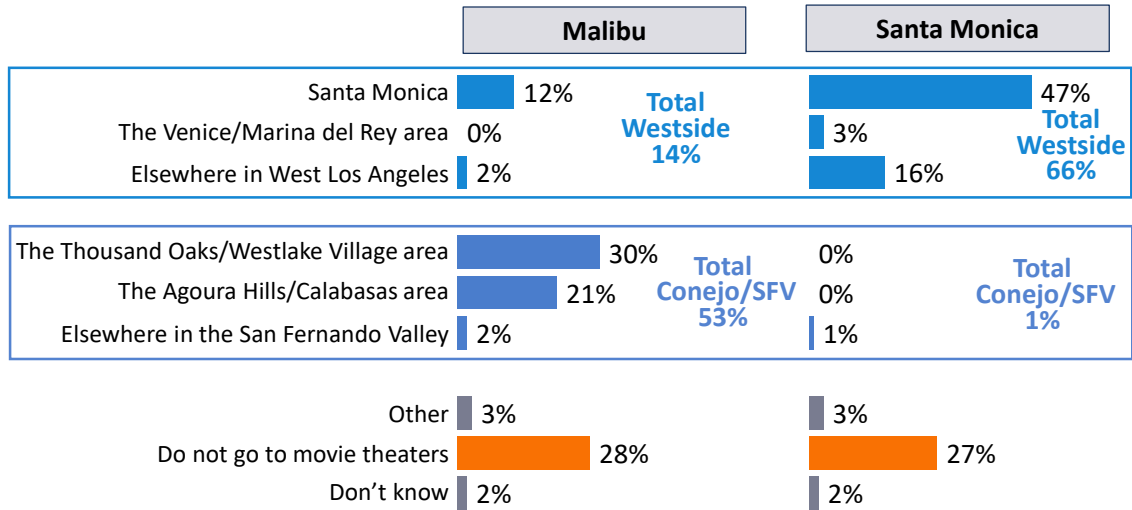


FIGURE 27

3 out of 4 Malibu moviegoers head over the hill for a movie theater rather than going to Santa Monica or elsewhere in the Westside—despite being of a similar distance.

When you go to a movie theater, do you usually go to one in:



Discrete and Isolated Lifestyles. Overall, the majority of Santa Monica residents do not participate in any aspect of daily or community life in Malibu and vice versa. (**Figures 28 and 29**) Santa Monica residents do not participate in Malibu community events. (**Figure 30**)

FIGURE 28

The vast majority of Santa Monica respondents do not participate in aspects of daily or community life in Malibu.

*How often do you do each of the following specifically in the City of Malibu?
If your activities have changed because of COVID-19, please consider your activities before COVID-19.*

(Santa Monica respondents shown; Ranked by Total Often/Sometimes)

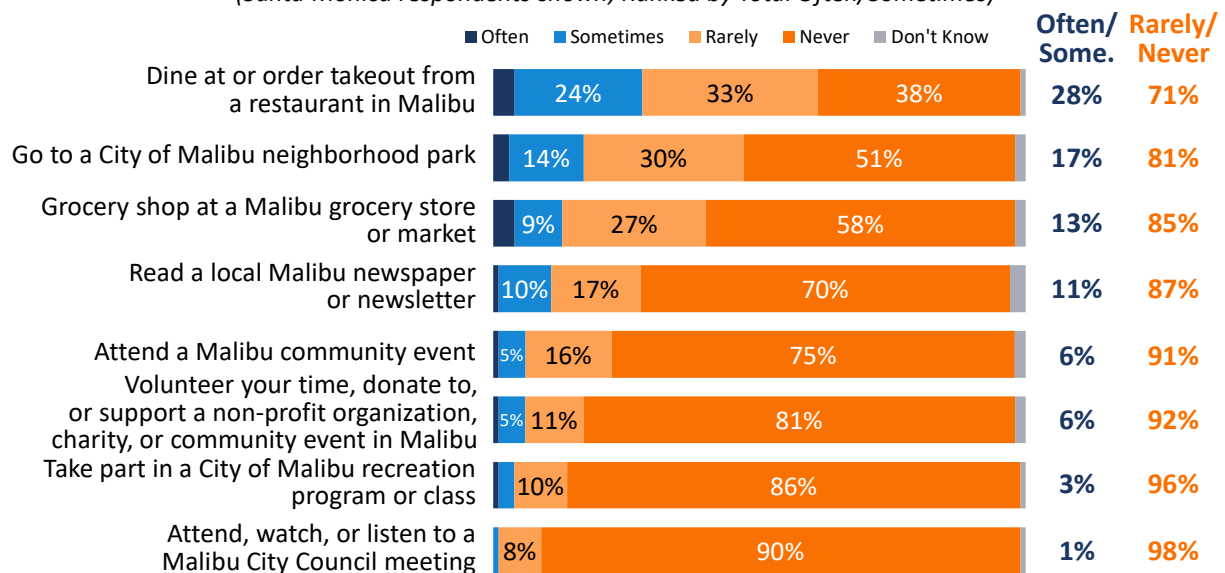


FIGURE 29

Conversely, the vast majority of Malibu respondents do not participate in aspects of daily or community life in Santa Monica.

How often do you do each of the following specifically in the City of Santa Monica? If your activities have changed because of COVID-19, please consider your activities before COVID-19.

(Malibu Respondents Shown; Ranked by Total Often/Sometimes)

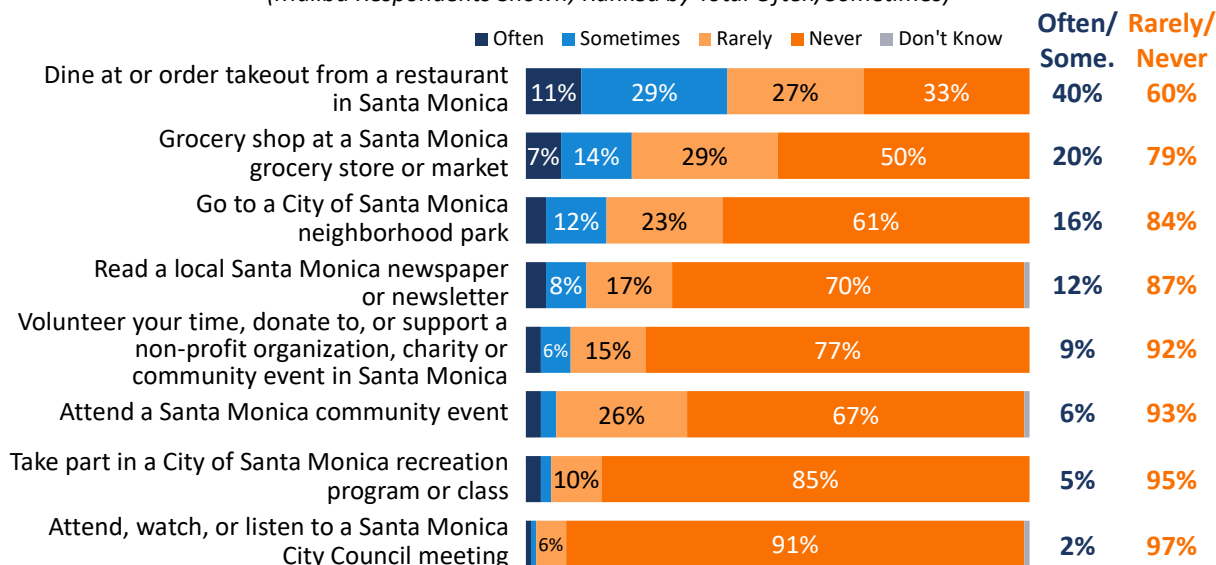
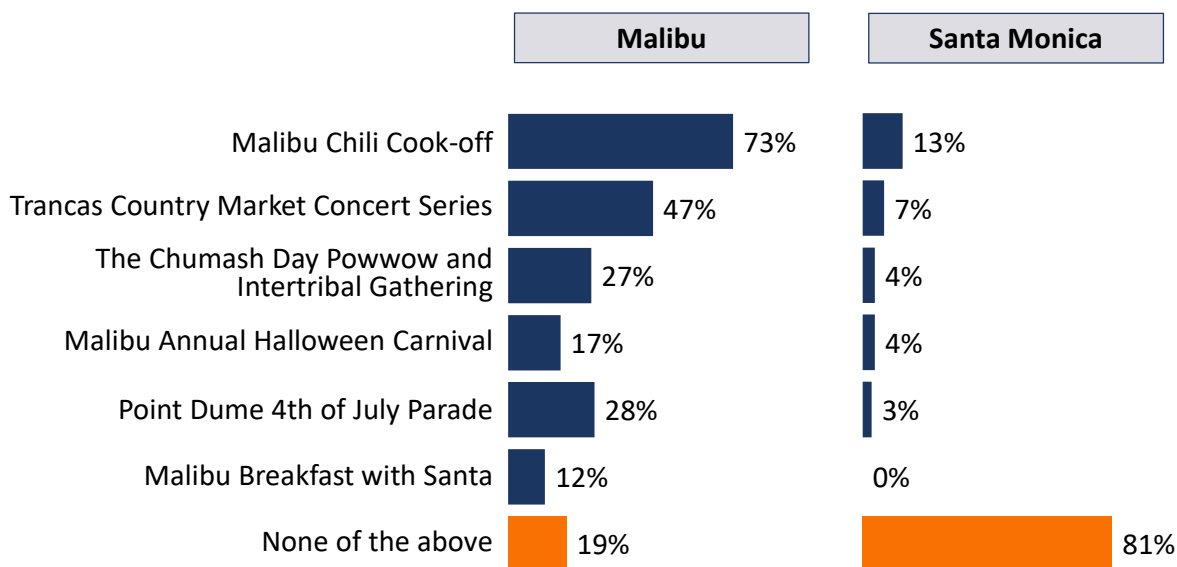


FIGURE 30

Santa Monica respondents do not participate in Malibu community events.

Please indicate if you have attended any of the following events in the City of Malibu.



The concerns of Malibu residents are different than the concerns of Santa Monica residents. Malibu residents were twice as likely as Santa Monica residents to say that Wi-Fi at their home is unreliable. (**Figure 31**) Plus, three out of four Malibu respondents consider cell phone reception to be at least a somewhat serious problem compared to just 6% of Santa Monica residents. (**Figure 32**)

FIGURE 31

Malibu respondents are twice as likely to say Wi-Fi at their home is unreliable or not reliable at all.

How reliable would you say Wi-Fi is at your home? Is it very reliable, somewhat reliable, somewhat unreliable, or not reliable at all?

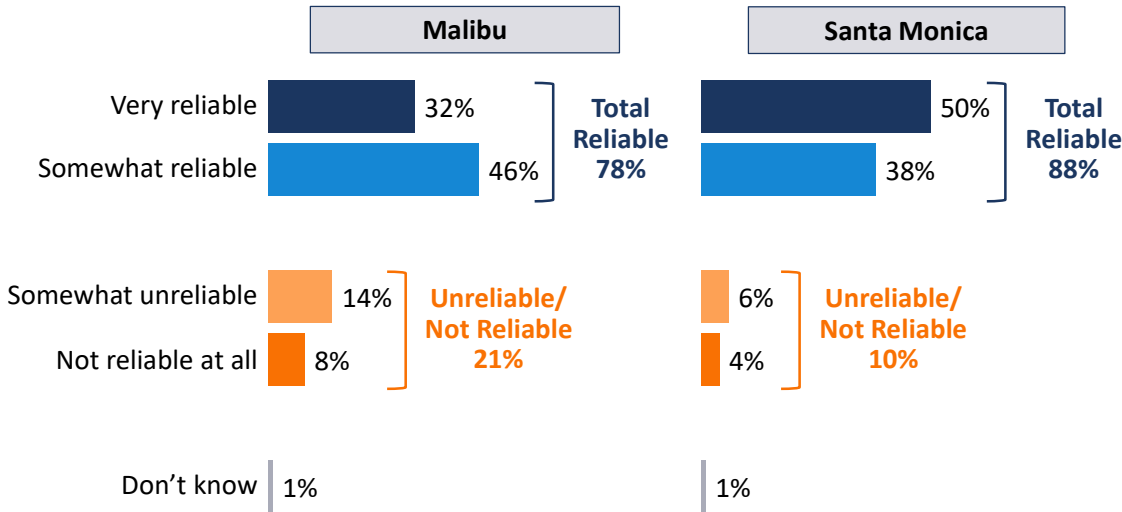
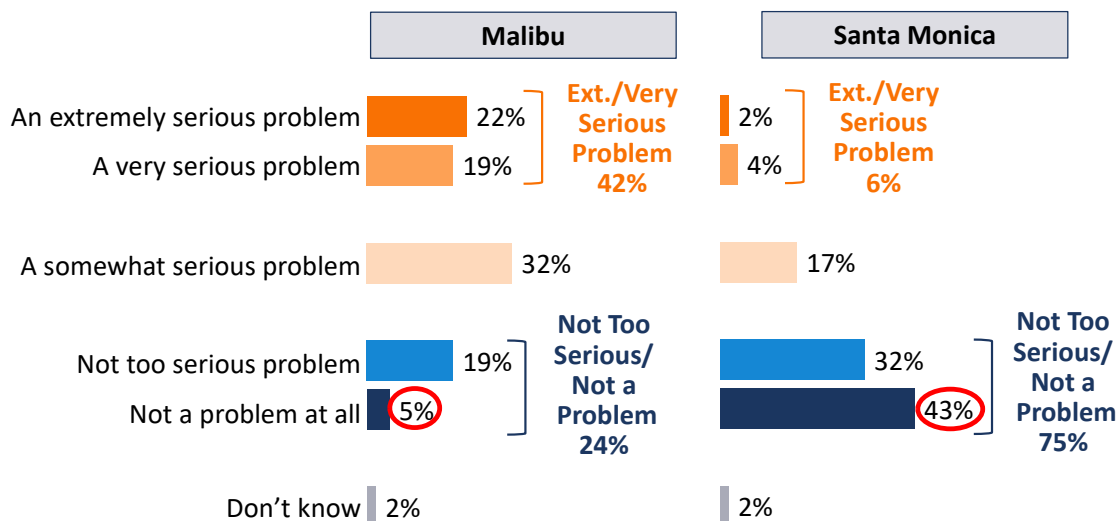


FIGURE 32

3 out of 4 Malibu respondents consider cell phone reception where they live to be at least a somewhat serious problem, compared to just 6% of Santa Monica respondents.

*In general, do you consider cell phone reception in **Santa Monica/Malibu** to be:*

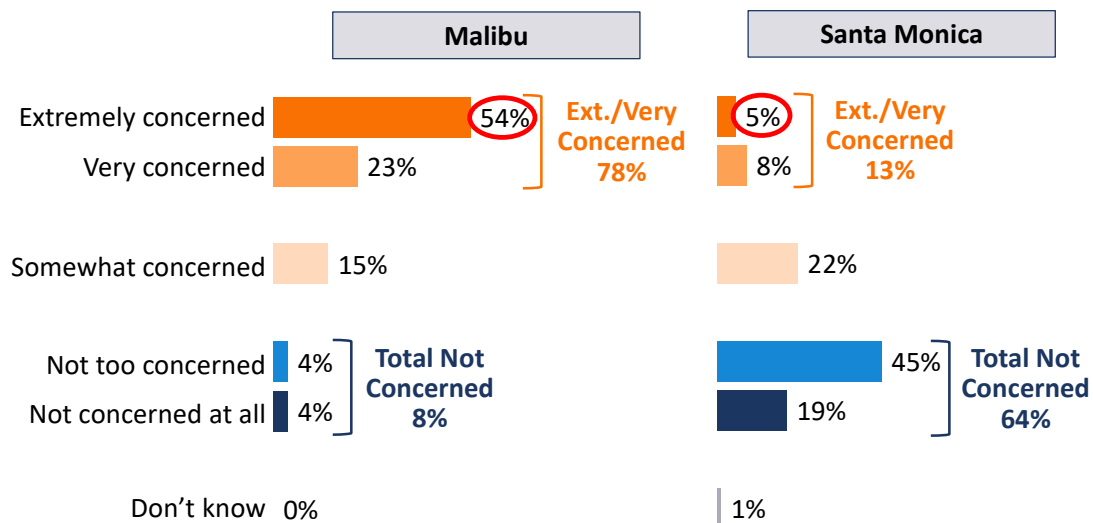


An issue commonly identified by Malibu survey respondents is their concern with power outages where they live, with nearly eight in ten Malibu residents expressing concern. (**Figure 33**) This is simply not a problem in Santa Monica.

FIGURE 33

Nearly 8 in 10 Malibu respondents are very or extremely concerned about power outages where they live; just over 1 in 10 Santa Monica respondents feel this way.

How concerned are you about the possibility of power outages where you live?



SM-MUSD Governing Board. The current SM-MUSD is comprised of seven Board members elected at-large. On the current Board, there is one Board member that lives in the Malibu area, but there have been several years when there was no Board member that lived in Malibu. Given the relative size of the Malibu population as compared to Santa Monica, this is expected, as Malibu students make up about 12% of the total student population and Malibu registered voters make up about 15% of the total District. However, this lack of representation means that the Malibu voice is not heard. The lack of local control coupled with the quite different community identities of Santa Monica and Malibu have led to the petition to separate the Malibu area from SM-MUSD.

Ability to Meet Feasibility Criterion #2:

The two communities are non-contiguous and distinctly separate communities where students and community members typically attend schools and participate in activities within their own geographic area. Although the proposed new MUSD is not located only within the City of Malibu, residents in the area receive services from many common public service providers, share common social and community centers, and frequent common business establishments.

The two communities of Malibu and Santa Monica are very distinct from one another in all areas considered in the CCR and in the CDE Handbook. The proposed reorganization will provide opportunities to maintain and very likely enhance the community's sense of identity through common goals in the school community. It is anticipated that Criterion #2 would be substantially met.

CRITERION #3: EQUITABLE DIVISION OF PROPERTY AND FACILITIES

Education Code Section 35753(a)(3):

The proposal will result in an equitable division of property and facilities of the original district or districts.

California Code of Regulations, Title 5, Section 18573(a)(3):

To determine whether an equitable division of property and facilities will occur, the Department will determine which of the criteria authorized in Education Code Section 35736 shall be applied. It shall also ascertain whether the affected school districts and the county office of education are prepared to appoint the committee described in Education Code Section 35565 to settle disputes arising from such division of property.

Further guidance on this criterion is provided in Education Code Sections 35560, 35736, 35561, and 35565. Based on Education Code Section 35560, the real property and personal property and fixtures normally situated in the school sites within the new school district boundaries would belong to the resulting districts. All other property, funds, and obligations (except bonded indebtedness) must be divided pro rata between the impacted districts. Education Code Section 35736 allows for a variety of methods to equitably divide the remaining property and funds, including assessed valuation, average daily attendance (ADA), value and location of property, or other equitable means.

Education Code Section 35565 states that if a dispute arises concerning the division of funds, property, or obligations, a board of arbitrators shall be appointed which shall resolve the dispute; or the districts may mutually agree to the appointment of a sole arbitrator by the county superintendent of schools.

Key Findings:

- The Education Code provides direction on the allocation for all assets, liabilities, and fund balances.
 - There is no reason to believe the Education Code provisions cannot be applied to this proposed reorganization.
- Real property would be distributed based on the location of such property.
- Bonded indebtedness will be repaid by the same taxpayers that are currently paying taxes on each series of bonds.
 - Bonds of SFID No. 1 will be repaid by the SMUSD tax base, bonds of SFID No. 2 will be repaid by the MUSD tax base, and all other bonds will be repaid by the combined tax base.

Analysis of Criterion #3:

Real Property

All real property currently located within the territory of MUSD can be allocated to MUSD post-separation, likewise, all real property currently located within the territory of SMUSD can be allocated to SMUSD post-separation. The proposed reorganization would result in the transfer of four school sites – Webster Elementary, Malibu Elementary, Malibu Middle, and Malibu High – as well as several parcels located within the Malibu area of the District. These sites are identified in **Figure 34**. With the exception of the school sites, the other parcels to be transferred are not developed.

The transfer of these parcels to the proposed MUSD would not have an impact on the operations of SMUSD, as no district-wide programs or support services are housed in or offered at Malibu school sites and Santa Monica students do not attend school in Malibu.

FIGURE 34

Parcels Owned by Santa Monica-Malibu Unified School District			
APN	Use	Location	Lot Acres
Malibu Parcels			
4458-023-903	Vacant	Malibu Crest Drive	21.624
4458-027-903	Webster Elementary	3602 Winter Canyon Road	6.379
4458-027-904	Vacant	Winter Canyon Road	1.536
4466-012-900	Point Dume Elementary	6955 Fernihill Drive	6.243
4469-017-900	Malibu Elementary, Malibu Middle, Malibu High	30215 Morning View Drive	40.056
4469-018-900	Trancas Riders and Ropers	6225 Merritt Drive	2.488
4469-018-901	Vacant	Merritt Drive	2.438
4469-018-902	Vacant	Merritt Drive	2.665
4469-018-903	Vacant/Parking Lot	Morning View Drive	9.396
4469-018-904	Vacant/Parking Lot	Merritt Drive	2.573
4469-019-900	Vacant	Merritt Drive	4.054
4469-019-901	Vacant	Merritt Drive	5.544
4469-019-902	Vacant	Merritt Drive	17.474

Source: Los Angeles County Assessor's Office and ParcelQuest.

The remaining parcels owned by SM-MUSD would remain with SMUSD. Such parcels are identified in **Figure 35**. Of the 28 parcels identified that would remain with SMUSD, most are utilized as school campuses or for ancillary school uses, such as parking lots. There is one parcel of note that is used by SM-MUSD as an investment property, generating lease income from the operation of a hotel and an office building. The property is located at 1707 4th Street. Given the location of the property, it is likely to have a high market value. SMUSD could retain ownership of the 4th Street parcel and would continue to benefit from the ongoing lease revenues as unrestricted General Fund revenues. SMUSD would also retain the debt obligations related to this parcel.

FIGURE 35

Parcels Owned by Santa Monica-Malibu Unified School District			
APN	Use	Location	Lot Acres
Santa Monica Parcels			
4273-009-900	Grant Elementary	2368 Pearl Street	6.011
4273-021-901	Parking Lot	Pearl Street	0.967
4273-024-900	John Adams Middle	2425 16th Street	16.401
4274-005-901	Edison Language Academy	2508 Virginia Avenue	0.289
4274-005-902	Edison Language Academy	2512 Virginia Avenue	0.305
4274-005-903	Edison Language Academy	2402 Virginia Avenue	4.855
4276-023-900	McKinley Elementary	2401 Santa Monica Boulevard	6.487
4277-002-900	Franklin Elementary	2400 Montana Avenue	0.367
4277-002-901	Franklin Elementary	2400 Montana Avenue	5.236
4280-022-900	Roosevelt Elementary	801 Montana Avenue	5.992
4281-005-901	Lincoln Child Development Center	1520 California Avenue	0.344
4281-006-900	Lincoln Middle	1501 California Avenue	9.917
4282-012-900	Santa Monica College Performing Arts Center	1310 11th Street	4.407
4283-001-901	Parking Lot	Colorado Avenue	0.233
4283-002-900	Industrial/Office Building	902 Colorado Avenue	1.831
4283-010-900	Santa Monica Malibu Unified Administration	1651 16th Street	3.702
4284-038-900	Will Rogers Learning Community	2401 14th Street	6.103
4284-038-901	Church	1515 Maple Street	0.58
4287-002-900	Olympic High	721 Ocean Park Boulevard	4.307
4287-006-900	John Muir Elementary	2526 6th Street	5.588
4287-020-902	The Growing Place	401 Ashland Avenue	1.099
4287-022-900	Child Development Services	2802 4th Street	1.714
4290-003-901	Santa Monica High	601 Pico Boulevard	1.259
4290-005-900	Santa Monica High	601 Pico Boulevard	15.49
4290-006-904	Santa Monica High	601 Pico Boulevard	1.79
4290-006-905	District Headquarters and Hotel	1707 4th Street	2.255
4290-007-902	Santa Monica High	601 Pico Boulevard	3.929
4290-008-901	Santa Monica High	601 Pico Boulevard	3.416

Evaluation of Existing School Facilities

As described in the CDE Handbook, the Feasibility analysis will include an “evaluation and report of the utilization, capacity, and condition of existing school facilities.” The City of Malibu staff and consulting team, in coordination with SM-MUSD facilities staff, completed site walks to analyze the condition of the four Malibu schools that would be transferred to the proposed MUSD.

Malibu Elementary. Classrooms at Malibu Elementary are clean and comfortable, with ample classroom space for students. The campus has state-of-the-art SMART Board technology, teacher laptops, and document projectors in every classroom.

The Kindergarten area is separated, with its own play yard, and there is room for a TK classroom if needed. There is a science/marine room that has large water aquarium tanks and a separate learning area, where classes rotate in for lessons.

There are separate spaces/classrooms for special education, reading intervention, art, computers, music, and a library. All classrooms are well-equipped with SMART Boards, projectors, computers, and new furniture.

The cafeteria receives food from Malibu High School which gets it from Santa Monica. There are well-stocked and maintained custodial closets, but no maintenance facilities.

The school looks like it was freshly painted in the last few years, and the utilities were upgraded with new HVAC/thermostats and controls. Water fountains have water bottle refill areas. No major areas of concern were noted in the facility inspection.



Classroom capacity is more than adequate to serve the current and projected student population.

Webster Elementary. Webster school was originally built in the late 1940s. Two major reconstruction projects in the past 20 years have resulted in all new plumbing, heating, electrical, and roofing systems. Major improvements in seismic safety and accessibility are in place. The school is well-maintained and is in well-functioning condition. Every classroom has an interactive white board and a SMART Board, and an ELMO document camera. Only one area of concern was noted in the facility inspection. There is insufficient parking available for staff and visitors.

The school is well-maintained with lush landscaping. The campus also includes a park area with a garden area that has an outdoor stage and a huge historic tree.

The school has a TK and a Pre-K area with a separate playground that has been newly upgraded. There are also Kindergarten classrooms in the main wings of the school. All Kindergarten and TK classrooms have restrooms and sinks. The school has a second garden area in the upper yard that was in the middle of being renovated during the facility inspection. It was noted that this area could be a safety hazard, as there were many gopher holes and tripping hazards. The actual playground facilities were not remarkable but did include quite a bit of space for a soccer field and a blacktop for basketball.



The cafeteria, library, and multipurpose room are all centrally located in the school, with space for inside and outside dining. The food is brought up from Malibu High School and warmed on site. There are two separate wellness areas, one for COVID check-in and one in the main office for traditional health needs.

The site also has set aside space for the Boys and Girls Club of Malibu, and it has several portables in the rear of the school that are not being used.

The school has sufficient capacity to accommodate the current and anticipated future student population.

Malibu Middle/High School. Currently both Malibu Middle and High School share one campus that is in the midst of a significant remodel, addition, and reconfiguration. Both schools use the same cafetorium/theater. Food is currently being brought in from Santa Monica and warmed, with limited cooking done on the campus. Students mainly eat outside and around the campus. The gym space is broken up between the old gym and the new gym. The high school students use the new gym space and the locker rooms.

The library is located in a new building which is shared between the Middle and High School. The new building, which opened in 2021, is a two-story building with extensive administrative space and

middle school classrooms on the second floor. It also houses science labs for both the Middle and High School. The classrooms are a bit undersized in the new building, with less than 1,100 square feet per room.



The other Middle School building is a rehabbed container building that was constructed to replace one of the buildings that contained significant PCBs. Each room contains an air scrubber as well, which was part of the PCB solution. The campus still has some rooms in the older buildings that are off limits and sealed off due to the presence of PCBs. The more saturated PCB buildings have been demolished and those spaces are awaiting new construction.

The High School classrooms are primarily housed in a two-story modular building. The buildings have no air conditioning or restrooms and there is a portable village of approximately nine classrooms that house special education classes.

Construction of a new building with an administration wing, library, classrooms, and labs began in October 2023. Modernization and new construction will include replacing the existing library and administrative building with a new library, three science labs, two computer labs, and four general classrooms. Ten classrooms in Building E will be renovated and reconfigured to provide two additional classrooms and a new IT room, which will house the main technology infrastructure. Ventilation in the gymnasium locker rooms and the existing fire alarm system will be upgraded. Outdoor improvements will include renovating the common areas, a new 150-space parking lot (Parking Lot E), and the reconfiguration of Parking Lot A. The equestrian trail will be relocated near the new Parking Lot E to accommodate a new student drop-off and pick-up lane.

Fifteen (15) existing classrooms were upgraded to the district's new technology standards. The standard includes a projector and screen, document camera, DVD player, and a sound system with a wireless microphone. The school has been upgraded to 1Gpbs of networking and campus-wide Wi-Fi. The telephone systems were replaced with a district-wide IP telephone system (VOIP). One teacher and eight student laptops were provided for sixteen science classrooms. Wireless access points were installed throughout the campus and the phone system was replaced with a new IP telephone system. The campus network infrastructure was upgraded to one-gigabit bandwidth to support the wireless access and telephone upgrades.



There are graphic arts, ceramics, and music spaces shared between the Middle and High School. The fields and pool are also shared. The District secured a legal settlement with the neighbors regarding

field lighting, whereby, the poles are allowed to stay up all year round, but after football season, the light fixtures must be removed; it is said to be an expensive annual expenditure to take down and re-install the field lights annually.

An extensive campus Facility Master Plan describes four phases of improvements that includes the construction of a new High School classroom building in Phase 1 as well as many other improvements campus wide. To the extent that those improvements are implemented, the High School will have separate facilities from the Middle School and the overall layout of the campus will be significantly improved.

Classroom capacity on the current site is more than adequate to serve the current and anticipated future student population. The campus Master Plan includes additional classrooms that will provide more learning spaces for the future student population.

Personal Property

Personal property that is located at or designated for use by a specific school site is subject to the requirements of Education Code Section 35560. As such, personal property, such as desks or computers, that are located on a school site that would be transferred to the proposed MUSD, would also be transferred to MUSD.

District-wide property, such as school buses or maintenance tools, would be subject to division between the proposed MUSD and SMUSD. Specifically, furniture, equipment, and vehicles owned by SM-MUSD that serve school sites and properties in both the Malibu and Santa Monica areas of the SM-MUSD can be allocated per the Education Code.

Bonded Indebtedness

SM-MUSD voters have approved three ***District-wide*** general obligation bond measures. The first measure was in 1998 and authorized \$42 million of bonds. The second measure was in 2006 and authorized \$268 million of bonds. Approximately \$35 million of the 2006 measure was spent on schools in the Malibu area, including an administrative building and library at Malibu Middle School. Finally, in 2012 voters throughout SM-MUSD authorized \$385 million of bonds, approximately \$77 million of which was allocated to Malibu area schools for the Middle School administrative building and library project as well as improvements to both elementary schools. It is our understanding that all bond proceeds from these three measures have been spent. However, if bond proceeds remain, such proceeds would be allocated based on the assessed value of property within each area of the District. As of 2024-25, the Malibu area of the District comprises 35% of the total assessed value in the District.

In November 2018, the voters within only the Santa Monica region of the District, called School Facilities Improvement District (SFID) No. 1, approved a measure authorizing \$485 million in bonds. All proceeds from this measure must be spent on schools within the Santa Monica area of the District. All \$485 million authorized under this measure have been issued. These bonds will continue to be repaid by taxpayers within SMUSD.

Also in November 2018, the voters within only the Malibu region of the District, called SFID No. 2, approved a measure authorizing \$195 million in bonds. Funding from this bond measure is intended to be used to reconstruct Malibu High School, upgrade technology, improve gate access, and complete fire alarm upgrades. All \$195 million authorized under this measure have been issued. These bonds will continue to be repaid by taxpayers within MUSD.

In November 2024, the voters within SFID No. 1 (Santa Monica) appear to have approved a measure authorizing \$495 million in bonds. As of the time of this Report, the election results have not yet been certified, but it is expected that the measure will pass. Any bonds issued by the time this proposed separation is implemented would remain the responsibility of taxpayers within SMUSD. The authority to issue all authorized but unissued bonds would remain with SMUSD.

In November 2024, the voters within SFID No. 2 (Malibu) appear to have approved a measure authorizing \$395 million in bonds. As of the time of this Report, the election results have not yet been certified, but it is expected that the measure will pass. Any bonds issued by the time this proposed separation is implemented would remain the responsibility of taxpayers within MUSD. The authority to issue all authorized but unissued bonds would be transferred to the proposed MUSD, as the entire territory of SFID No. 2 is coterminous within the proposed boundaries of MUSD.

Figure 36 shows the series, issue and maturity dates, the original issue and the bonds outstanding as of June 30, 2023.

FIGURE 36

Outstanding Bonds				
Series	Issue Date	Maturity	Original Issue	Bonds Outstanding As of June 30, 2023
Election 1998, Series 1999	5/26/1999	8/1/2023	\$38,000,034	\$6,170,103
2013 Refunding Bonds	1/8/2013	8/1/2032	\$45,425,000	\$2,265,000
Election 2006, Series D	3/19/2013	7/1/2037	\$82,995,327	\$1,115,000
2015 Refunding Bonds	11/10/2015	8/1/2034	\$47,915,000	\$8,080,000
2016 Series A Refunding Bonds	10/11/2016	7/1/2035	\$28,190,000	\$23,515,000
2016 Series B Refunding Bonds	10/11/2016	7/1/2032	\$660,000	\$660,000
2016 Series C Refunding Bonds	10/11/2016	7/1/2035	\$52,140,000	\$51,905,000
Election 2012, Series C	6/21/2017	7/1/2042	\$60,000,000	\$34,050,000
Election 2012, Series D	9/6/2018	8/1/2043	\$120,000,000	\$8,650,000
SFID No. 1 Election 2018, Series A	10/2/2019	8/1/2049	\$110,000,000	\$79,160,000
SFID No. 2 Election 2018, Series A	10/2/2019	8/1/2049	\$35,000,000	\$23,840,000
Election 2012, Series E	11/6/2019	8/1/2036	\$115,000,000	\$108,100,000
2019 Refunding Bonds	11/6/2019	8/1/2043	\$105,915,000	\$101,935,000
2020 Refunding Bonds	8/5/2020	7/1/2040	\$74,720,000	\$72,610,000
SFID No. 1 Election 2018, Series B	7/1/2021	8/1/2050	\$200,000,000	\$172,540,000
SFID No. 2 Election 2018, Series B	7/1/2021	8/1/2050	\$80,000,000	\$29,260,000
2021 Refunding Bonds	9/1/2021	8/1/2038	\$122,170,000	\$119,680,000
SFID No. 1 Election 2018, Series C	10/26/2023	8/1/2053	\$175,000,000	\$175,000,000
Total				\$1,018,535,103

Source: Santa Monica-Malibu Unified School District Financial Statement, June 30, 2023.

Additionally, in August 2024, SM-MUSD issued the remaining \$80 million of SFID No. 2 bonds. As they were issued in the current fiscal year, they did not appear on the June 30, 2023 audit. As such, SM-MUSD has outstanding bonds totaling \$1,098,535,103.

As school facilities improvements funded from all bond measures were completed on both Malibu and Santa Monica area schools, the repayment obligation of the three district-wide bond measures will continue to be repaid from both the Malibu and Santa Monica tax bases allocated based on assessed value in each community. Unspent bond proceeds and authorized but unissued bonds from the two 2018 SFID measures would transfer to the school district serving each SFID.

Additionally, since the boundaries of the proposed MUSD follow the same boundaries as SFID No. 2, taxpayers within the proposed MUSD's boundaries would be responsible for the repayment of all SFID No. 2 bonds. Likewise, since the boundaries of the remaining SMUSD follow the same boundaries as SFID No. 1, taxpayers in the remaining SMUSD would be responsible for the repayment of all SFID No. 1 bonds. Ultimately, the reorganization proposal will have no effect on the amount due by property owners, as the property owners within the proposed MUSD's boundaries are already paying

debt service on SM-MUSD bonds. They would see no net change in payments due on outstanding General Obligation bonds as a result of the reorganization.

According to Education Code Section 35572, “no territory shall be taken from any school district having any outstanding bonded indebtedness...where the action...would so reduce the last equalized assessed valuation of the divided district so that the outstanding bonded indebtedness of the divided district would exceed 5 percent of the assessed valuation in the remaining territory of the divided district.” As shown in **Figure 37**, as of September 2024, the SM-MUSD outstanding District-wide bonds are 0.69% of the total assessed value in the District. This excludes the SFID No. 1 and No. 2 bonds as the assessed value responsible for repaying the SFID bonds would not change with the proposed reorganization. Post-reorganization, the outstanding bonds would be 1.06% of the assessed value of the remaining district. This is well below the 5% threshold set forth in the Education Code.

FIGURE 37

Outstanding Bonds as a Percentage of Assessed Value	
Outstanding Districtwide Bonds (Non-SFID)	\$538,735,103
Santa Monica-Malibu USD Assessed Value	\$78,116,544,293
Bonded Indebtedness as a % of Assessed Value	0.69%
Remaining Santa Monica USD Assessed Value	\$50,905,847,011
Bonded Indebtedness as a % of Assessed Value	1.06%

Other Outstanding Debt. In 2020, SM-MUSD issued \$25.7 million of Certificates of Participation (COPs) to fund improvements to the new administrative office building. The COP liability would be allocated to SMUSD, as it was used to fund the administrative office building that will be used exclusively by SMUSD. The revenue source committed for COP repayment is redevelopment pass-through funds, which will be retained in their entirety by SMUSD. Given the use of the COP proceed is for a building to be retained by SMUSD and the dedicated repayment source for the COP is a revenue source to be retained by SMUSD, therefore, the liability for the COP and responsibility for repayment should be with SMUSD.

Pension and Other Post Employment Benefit (OPEB) Reserves and Liabilities

Pension and Other Post Employment Benefit (OPEB) liabilities shall be allocated between SMUSD and MUSD based on actual employee assignments determined by an actuarial study completed as soon as possible once employee assignments are identified.

Other Assets, Liabilities, and Fund Balances

The allocation of other assets, liabilities, and fund balances can be allocated between the Districts based on the provisions of the Education Code.

Fund Balances. Fund Balances can be proportionately allocated between SMUSD and MUSD based on estimated Fund Balances on July 1 of the first year of MUSD operations as described in the Education Code.

Ability to Meet Feasibility Criterion #3:

The proposed MUSD and remaining SMUSD can utilize the provisions of the Education Code to achieve equitable distribution of property, funds, and obligations of SM-MUSD. Therefore, it is anticipated that Criterion #3 would be substantially met.

CRITERION #4: DISCRIMINATION/SEGREGATION

Education Code Section 35753(a)(4):

The reorganization of the districts will preserve each affected district's ability to educate students in an integrated environment and will not promote racial or ethnic discrimination or segregation.

California Code of Regulations, Title 5, Section 18573(a)(4):

To determine whether the new districts will promote racial or ethnic discrimination or segregation, the State Board of Education will consider the effects of the following factors:

- The current number and percentage of pupils in each racial and ethnic group in the affected districts and schools in the affected districts, compared with the number and percentage of pupils in each racial and ethnic group in the affected districts and school if the proposal or petition were approved.
- The trends and rates of present and possible future growth or change in the total population in the districts affected, in each racial and ethnic group within the entire school district, and in each school of the affected districts.
- The school board policies regarding methods of preventing racial and ethnic segregation in the affected districts and the effect of the proposal or petition on any desegregation plan or program of the affected districts, whether voluntary or court ordered, designed to prevent or to alleviate racial or ethnic discrimination or segregation.
- The effect of factors such as distance between schools and attendance centers, terrain and geographic features that may involve safety hazards to pupils, capacity of schools, and related conditions or circumstances that may have an effect on the feasibility of integration of the affected schools.
- The effect of the proposal on the duty of the governing board of each of the affected districts to take steps, insofar as reasonably feasible, to alleviate segregation of minority pupils in schools regardless of its cause.

The CDE Handbook defines segregation to be "a condition in which a disproportionate percentage of minority students in a district or affected school(s) occurs as a result of a proposal, making it unrealistic to provide integrated educational experiences."

The CDE Handbook also defines an integrated educational experience as "the process of education in a racially and ethnically diverse school that has as its goal equal opportunities for participation and achievement among all racial and ethnic groups in the academic program and other activities of the school, together with the development of attitudes, behavior, and friendship based on the recognition of dignity and value in differences as well as similarities."

Key Findings:

- The proposed reorganization will not alter the attendance boundaries of any school sites and, therefore, will not change the racial and ethnic composition of any schools.
 - Therefore, there is no increase in the minority population of any school within SM-MUSD.
- This reorganization is not projected to significantly increase the percentage of minority group students in either of the reorganized school districts.
 - The reorganization will not create a segregated environment in any school in either SMUSD or MUSD.

Analysis of Criterion #4:

The CDE Handbook offers detailed instructions for how to analyze this criterion in its Appendix M. Specific guidance is provided in the CDE Handbook as to whether district-wide percentages should be evaluated, or school site specific figures should be used. As described in Appendix M, page 9 of the Handbook:

“Districtwide percentages are given primary consideration if there are relatively few schools in the affected district(s). Districtwide percentages are of limited value when applied to very large districts or if affected schools are distant from each other or if geographic, safety, or other factors must be considered. In such cases, only “affected” schools are considered in the analysis.”

While we are not addressing “very large districts” in this instance, there is a dividing distance between the regions/school clusters. In addition, the geographic topography paired with the traffic between the two regions raises safety concerns and restricts cross-region movement and/or interaction.

Given the distance and driving hazards between Malibu area schools and Santa Monica area schools coupled with the fact that the proposed reorganization will not alter the attendance boundaries of any school site, and therefore, will not change the racial and ethnic composition of any schools, the data will be analyzed on a school site basis. As previously stated, SM-MUSD currently operates separate educational pathways in Malibu and Santa Monica and students predominantly attend schools within their area of residence due to geographic distance and the safety hazards of commuting between the two cities.

The enrollment and demographic data available for school districts in California is obtained through CDE’s Dataquest reporting system. Student ethnicity is categorized into seven categories: African American, Native American, Asian, Filipino, Hispanic or Latino, Pacific Islander, and White. Many ethnicities currently represented in SM-MUSD are not individually identified and are simply categorized in the “White” category.

For the purposes of this analysis, the data, as gathered and reported to CDE, has been categorized into two categories: White and Non-White. All ethnicities other than White, as reported by CDE, are categorized as Non-White.

As shown in **Figure 38**, the ethnic make-up of the Malibu area schools is currently 77.6% White and 22.4% Non-White students, while the ethnic make-up of the Santa Monica area schools is currently 44% White and 56% Non-White students. These percentages will remain the same post-reorganization. As previously indicated, the student populations are not expected to change by any significant margin. There might be a slight change in race or ethnicity percentages based solely on the number of students entering the schools in kindergarten as compared to the number leaving from 12th grade, or based on the small number of students currently attending schools on intra-district transfers choosing to return to their attendance area schools.

FIGURE 38

2023-24 Student Enrollment by Ethnicity		
Name	% Non-White Students	% White Students
Malibu Area Schools		
Malibu Elementary School	18%	82%
Malibu High	26%	74%
Malibu Middle	24%	76%
Webster Elementary	17%	84%
Combined Malibu Area Schools	22.4%	77.6%
Santa Monica Area Schools		
Edison Elementary	73%	27%
Franklin Elementary	37%	63%
Grant Elementary	53%	47%
John Adams Middle	68%	32%
Lincoln Middle	45%	55%
McKinley Elementary	65%	35%
Olympic High (Continuation)	84%	16%
Roosevelt Elementary	43%	57%
Santa Monica Alternative (K-8)	46%	54%
Santa Monica High	59%	41%
Will Rogers Elementary	65%	35%
Combined Santa Monica Area Schools	56.0%	44.0%

Source: California Department of Education, DataQuest.

Districtwide, the current SM-MUSD student population is about 50% Non-White and 50% White, as shown in **Figure 39**. Post-reorganization, the remaining SMUSD student population would have a 4% increase in its Non-White student population. An increase of 4 percentage points on the minority population of SMUSD is not a significant increase in the percentage of minority group students and demonstrates that it is highly unlikely that this proposal will promote racial or ethnic segregation.

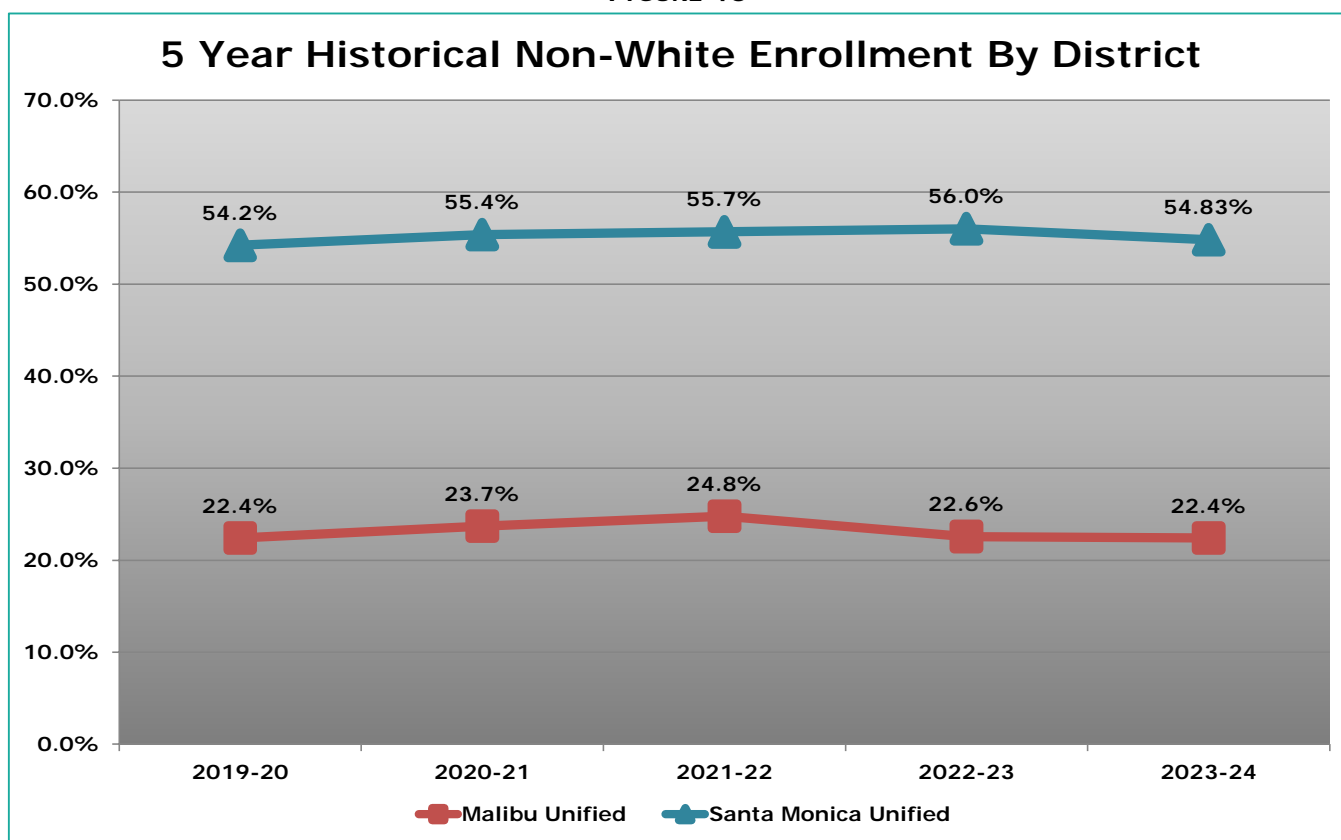
FIGURE 39

2020-21 Student Enrollment by Racial Groupings				
District	Non-White Students	Non-White Students	White Students	White Students
Santa Monica-Malibu Unified School District	4,479	52.0%	4,130	48.0%
Santa Monica Unified School District	4,250	56.0%	3,337	44.0%
Malibu Unified School District	229	22.4%	793	77.6%

Source: California Department of Education, DataQuest.

The Non-White enrollment has remained relatively steady in the current and proposed districts over the last 5 years, as shown in **Figure 40**.

FIGURE 40



Source: California Department of Education, DataQuest.

Based on the standards and conditions outlined in the CDE Handbook, it does not appear that the Non-White population of either the proposed MUSD or the remaining SMUSD would exceed the 75% mark within the next five years. The population of Non-White students, especially Hispanics or Latinos, is projected to increase in SMUSD, but it will not grow to such a level as to merit a concern about segregation.

Although the Malibu community is predominately “White” and the student population at Malibu area schools reflects that, this proposed reorganization is not creating any minority group segregation. As stated in Appendix M, page 8 of the CDE Handbook, “a proposal could be approved if majority group (white) ‘segregation’ occurs in the absence of any minority group segregation.” This would be the case in this proposed reorganization.

Even though the Malibu area of the District has a lower percentage of what is categorized as “Non-White students” based on the data as collected by CDE, there are several ethnicities prevalent in the community that simply are not accounted for given the constraints of the CDE data gathering process. The Malibu community includes a significant number of students from Middle Eastern and Eastern European countries that are not specifically accounted for in the CDE data. These students are seamlessly integrated into the Malibu area schools sites and will continue to be after reorganization.

Each reorganized district would only have one high school site. As such, options to integrate students within district boundaries are limited, especially given the 21-mile distance and typical 45 minute to 1 hour commute time between the two school sites. Should integration be required, SMUSD and MUSD could adopt an open enrollment policy, or such policies could be implemented with other nearby districts.

Malibu community members want to create a school district that could increase diversity by creating quality schools that would be attractive to a broader community of students from outside the area. The community would like to explore establishing affordable housing and offering inter-district permits with transportation to students and families wanting to attend the proposed MUSD. This desire was expressed in the visioning study described in the analysis for Criterion #6 in this Report. Ultimately, the future MUSD Board could consider policies aligned with the community’s desire for more diverse schools.

SM-MUSD has not received any court orders to desegregate. Any current policies were adopted voluntarily. Over the past twenty-plus years, SM-MUSD has undertaken a number of initiatives to address and reduce racial and socioeconomic disparities in student achievement. In 2016, SM-MUSD contracted with Pedro A. Noguera and Associates to conduct an equity-based review of its schools (“the Study”). Dr. Noguera is a renowned education expert and Dean of the USC Rossier School of Education. The Study provides observations regarding how SM-MUSD is currently operating and how modifications can improve racial and socioeconomic disparities. One observation of Noguera and Associates was specifically related to reorganization:

“Malibu-Santa Monica tension – the ongoing debate over separation, the intense debates that have unfolded over equity in funding and resources, have served as a major source of distraction from district equity efforts.”

Based on the data, minority enrollment in the resulting school districts would not exceed the standards used by the State Board of Education to determine when segregation occurs. However, the school districts could pursue open enrollment agreements to address any perceived racial imbalance. Further, the future MUSD school board could adopt policies to ensure the new district does not create an environment the promotes racial or ethnic segregation as fostering an environment of diversity and inclusion is a high priority to the Malibu community.

Ability to Meet Feasibility Criterion #4:

Since school site attendance boundaries will not change post-reorganization, the racial and ethnic make-up of each school site will remain status quo. It is reasonable to expect that the reorganization will preserve each district's ability to educate students in an integrated environment and will not promote racial or ethnic discrimination or segregation. The reorganization will further eliminate the distraction the District is currently facing in trying to improve student equity. As such, it is reasonable to expect that Criterion #4 will be substantially met.

CRITERION #5: NO INCREASE IN STATE COSTS

Education Code Section 35753(a)(5):

Any increase in costs to the state as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.

Key Findings:

- Both the proposed MUSD and the remaining SMUSD are projected to be Basic Aid post-reorganization. As such, there is not anticipated to be any increase in cost to the State related to State Aid.
- The reorganization will not create additional costs to the State for school facilities, special education or categorical programs, special education transportation costs, or any Necessary Small Schools.

Analysis of Criterion #5:

As described in the CDE Handbook, the cost to the State as a result of the proposed reorganization should be evaluated based on an analysis of the following items:

- (1) A change in basic aid status of one or both districts resulting in additional State aid
- (2) Additional state costs for school facilities
- (3) Additional costs for special or categorical programs
- (4) Effect on state reimbursements for special education transportation services
- (5) Increased costs from schools becoming Necessary Small Schools and qualifying for additional state funding

Evaluation of the Basic Aid Status of Both Districts

The reorganization would result in the proposed MUSD becoming a basic aid district, meaning that the District's local property tax revenue would exceed its LCFF entitlement. Because of the larger share of funding from property taxes, the MUSD would see an increase in its per pupil funding compared to the SM-MUSD.

Preliminary calculations for the new SMUSD indicate that the new district would continue to be Basic Aid with no increase in the State aid portion of the LCFF entitlement. The loss of excess property taxes to the SMUSD due to the loss of the Malibu property taxes would be mitigated through a tax exchange agreement described under Criterion #9 of this Feasibility Study that proposes to transfer property taxes from MUSD to SMUSD so that there is no harm to student services.

Local Control Funding Formula (LCFF). In 2013-14, a major change was made to school district funding. K-12 schools, including charter schools, moved from the Revenue Limit system to the Local Control Funding Formula (LCFF). The vast majority of a school district's revenues come from the LCFF calculation – whether the district is Community Funded (Basic Aid), or State Funded.

Simply stated, based on a few factors, an entitlement is calculated. The factors that make up the LCFF calculation are:

- District enrollment,
- Percent of enrollment from English Learners, low socio-economic, homeless, or foster students (Unduplicated Pupil Count),
- Average daily attendance (ADA),
- Cost of living adjustment (COLA) applied to base funding, and
- Property taxes.

The funding comes from two sources: property taxes and State aid. Usually, only a portion of the entitlement comes from taxes, with the remaining amount to balance to the entitlement coming from the State. However, when property taxes exceed the calculated entitlement, the district gets to keep the excess taxes and is labeled Basic Aid. A district does not choose nor strive toward Basic Aid status; a district is funded as either Basic Aid or State Funded, whichever provides the highest funding level.

When a district is classified as Basic Aid, Prop 30 Education Protection Act (EPA) dollars are provided on top of property taxes, and the State funding portion is held to a constant Minimum State Aid (MSA) level based on categorical programs funded in 2012-13, the year prior to the implementation of LCFF. Also, when a district is Basic Aid, they no longer receive Supplemental Tax dollars or ERAF taxes. Those dollars are allocated elsewhere within the County to State Funded districts to offset required State Aid backfill.

Regarding the Unduplicated Pupil Count (UPC), the higher the percentage of students who are disadvantaged, the higher the level of per-student funding under the LCFF formula. For instance, a district with 20% disadvantaged students would be entitled to less funding than a district with 50% disadvantaged students. The current SM-MUSD district has a UPC of just under 31%. The underlying UPC for Malibu students is estimated at 17% while the underlying UPC for Santa Monica students is approximately 32%. Therefore, when Malibu students are removed from the current district's calculation, SMUSD's LCFF entitlement will increase slightly per student as the percentage of disadvantaged students increases.

New LCFF calculations were prepared for the proposed MUSD and the remaining SMUSD. The enrollment and ADA splits, and the portion of "unduplicated" students that were used by SM-MUSD were also used for these *pro forma* LCFF calculations.

For the new LCFF calculations, property taxes generated within each of the two new district attendance areas were used and the COLA estimates projected during 2024 were used. The Minimum State Aid dollars provided to the current district (\$8.5 million) were prorated between the two districts on a per-ADA basis. For a district in Basic Aid status, additional State funding for EPA at

\$200/ADA is provided and does not change based on the separation as the total number of students remains the same.

Based on the above variables, two new sets of LCFF funding projections were generated. These projections, including the portion of calculated State aid and property taxes, were compared to the current district's LCFF funding projections.

Enrollment and Average Daily Attendance (ADA). To estimate student enrollment, each site was noted to be located in Santa Monica boundaries or in Malibu. There are multiple sites that operate in Santa Monica but are alternative programs and may contain students who reside in Malibu. However, for the purposes of this analysis, it is assumed that all of the students who attend these alternative programs located in Santa Monica also reside in Santa Monica.

Using the number of students and related ADA, the calculation of per-student funding for the current district and for each new district was completed. These per-student funding amounts are used when examining whether there will be any financial impact on the State due to the proposed reorganization, and for analyzing the additional revenue sources above the calculated LCFF funded amounts.

Property Taxes. A tax exchange agreement will provide a temporary redistribution of property taxes from MUSD to SMUSD in order to hold the State and future SMUSD harmless and meet State reorganization Criterion #5. This temporary redistribution would still enable MUSD to maintain their Basic Aid status, and SMUSD would continue to be Basic Aid as well. Furthermore, SMUSD would receive additional funding from their portion of the parcel tax, redevelopment pass-through funding, City of Santa Monica sales taxes, City of Santa Monica joint use payments, City of Santa Monica Property Transfer Taxes, and other local revenue streams.

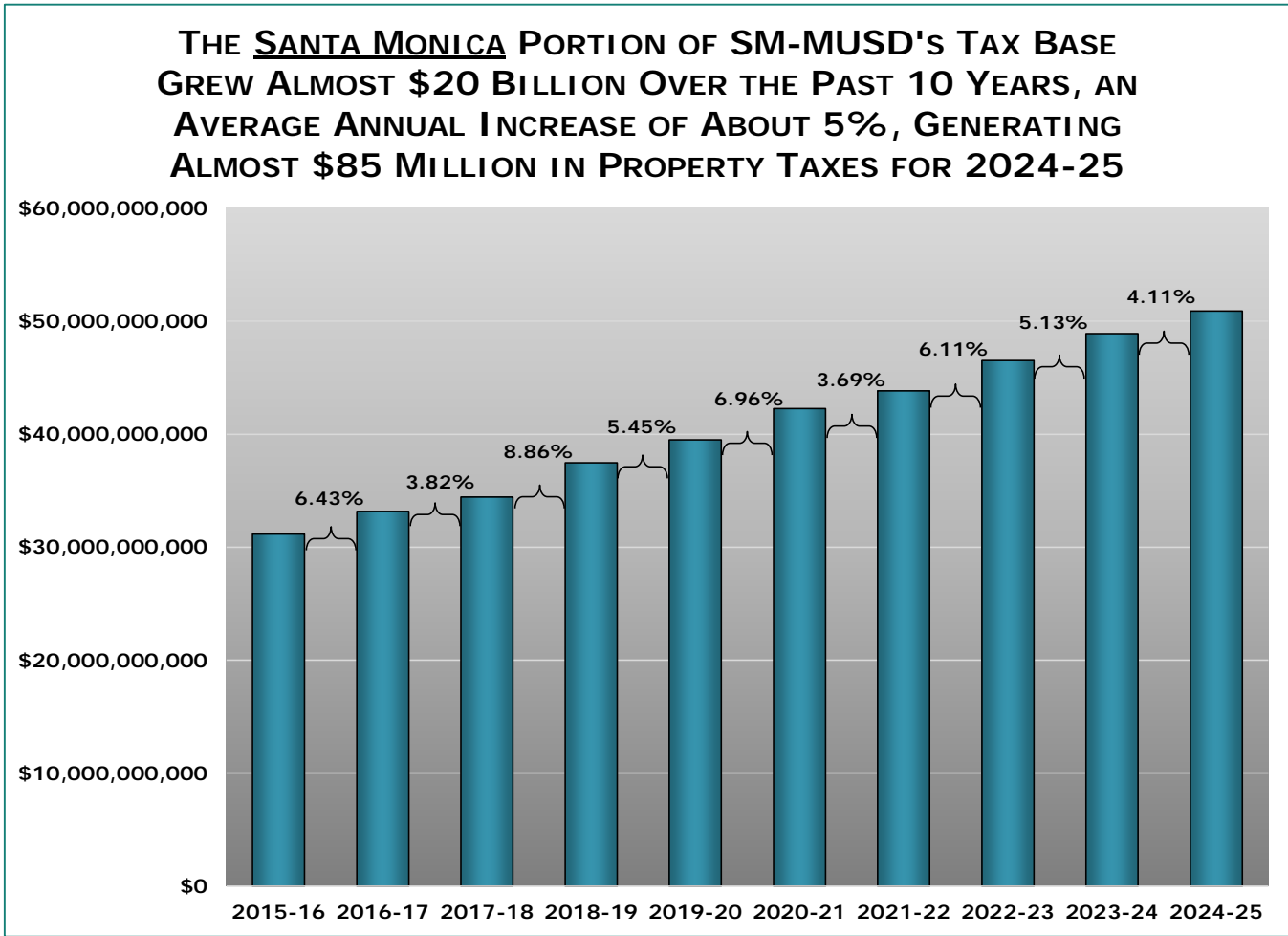
With the proposed reorganization, property taxes would be allocated to the school district serving the territory where the tax revenues are generated. Chapter 9, page 7, of the CDE Handbook describes the process by which the calculation is completed. Specifically, Section 99 of the Revenue and Taxation Code states that the agencies can request that the LA County Assessor provide the County Auditor with "a report that identifies the assessed valuations for the territory subject to the jurisdictional change and the tax rate area or areas in which the territory exists." Then, the LA County Auditor can "estimate the amount of property tax revenue generated within the territory that is subject of the jurisdictional change during the current fiscal year." Finally, the LA County Auditor can "estimate what proportion of the property tax revenue...is attributable to each local agency."

For the purposes of this Feasibility Study, the amount of property taxes to be allocated to each agency has been estimated based on the assessed value within the jurisdiction of the proposed MUSD and remaining SMUSD, applying the current AB 8 factors to estimate each agency's share of property taxes plus the estimated property tax exchange.

As shown in **Figure 41**, the SMUSD portion of the tax base has grown by an average annual rate of 5% per year over the past ten years. After accounting for tax revenues from the redevelopment

agency within Santa Monica, their \$50.9 billion tax base will generate approximately \$85 million of unrestricted property tax dollars for Santa Monica in 2024-25.

FIGURE 41



Source: Los Angeles County Auditor-Controller.

Although property taxes from the former redevelopment agency are deducted from the amount of general property taxes that SMUSD would otherwise receive, additional property tax revenues are allocated back to the District as Redevelopment Pass-Through and Redevelopment Residual payments. The money received from these two redevelopment categories are considered property taxes for the purpose of determining the amount of State Aid that a district would receive, and in this case, for determining the Basic Aid status of SMUSD.

As provided by the Los Angeles County Auditor-Controller, the Successor Redevelopment Agency will distribute a total of \$5,211,216 in Redevelopment Pass-Through payments and \$24,799,938 in Redevelopment Residual payments for a total of \$30,011,154 in additional property tax dollars for 2024-25. It is important to note that an additional \$3.37 million in funding will come from the Successor Redevelopment Agency in Redevelopment Pass-Through payments that are designated for facilities use and not considered property taxes.

As shown in **Figure 42**, the total property tax revenues for the SMUSD portion of SM-MUSD for 2024-25 is estimated to be approximately \$85 million.

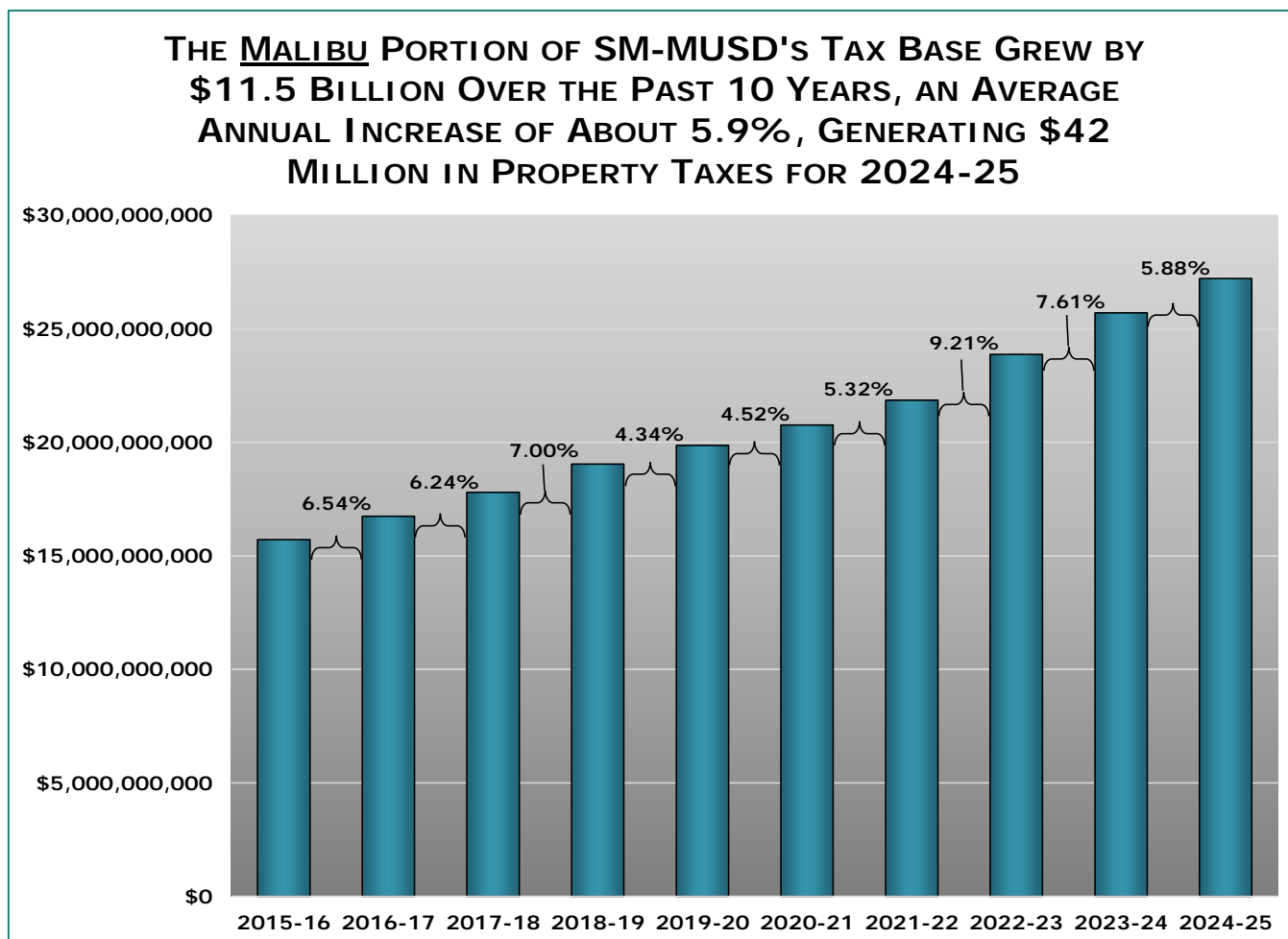
FIGURE 42
ESTIMATED SMUSD PROPERTY TAX ALLOCATION
FOR 2024-25

Property Tax Funding Source	Estimated 2024-25
Property Taxes	\$54,579,000
RDA Pass-Through Property Tax	\$5,211,216
RDA Residual	\$24,799,938
Total	\$84,590,154

Source: Los Angeles County Auditor-Controller.

As shown in **Figure 43**, the MUSD portion of the tax base has grown by an average annual rate of 5.9% per year over the past ten years. Their \$27 billion tax base will generate approximately \$42 million of general property tax dollars in 2024-25. Since there is no redevelopment agency within Malibu, no additional adjustments need to be made to the property tax estimates for the proposed MUSD.

FIGURE 43



Source: Los Angeles County Auditor-Controller.

These property tax figures are then applied to the Local Control Funding Formula (LCFF) calculator to evaluate whether the districts would retain their basic aid status post-reorganization in order to determine whether there would be an additional cost to the State due to this propose reorganization.

LCFF Calculations. The factors discussed above are combined as illustrated in **Figure 44** to calculate a district's LCFF entitlement:

FIGURE 44

$$\left(\text{ADA} \times \text{Base Funding by Grade Group}^* \right) + \left(\text{ADA} \times \text{Grade Span Adj (GSA)}^{**} \right) + \left(\text{UPC}\% \times 20\% \times \text{Base Funding by Grade Group}^* \right) = \text{LCFF Entitlement}$$

* Base amount is different for each grade span - K-3, 4-6, 7-8, and 9-12

** Grade Span Adjustment for K-3 for Class Size Reduction and for 9-12 for CTE

Once the calculation is made, based on a district's unique property tax amount, the specific funding sources are identified to fund the entitlement:

- State aid, at least Minimum State Aid (MSA) amount
- EPA (part of State aid if State Funded, in addition to MSA if Basic Aid)
- Property Taxes

Based on the LCFF calculator, both the proposed MUSD and remaining SMUSD would receive more in property taxes than the calculated LCFF entitlement, making them both Basic Aid after reorganization, as shown in ***Figures 45 and 46***.

FIGURE 45
SMUSD LCFF ENTITLEMENT

	2024-25	2025-26	2026-27	2027-28
SUMMARY OF FUNDING				
General Assumptions				
COLA & Augmentation	1.07%	2.93%	3.08%	3.30%
Base Grant Proration Factor	0.00%	0.00%	0.00%	0.00%
Add-on, ERT & MSA Proration Factor	0.00%	0.00%	0.00%	0.00%
LCFF Entitlement				
Base Grant	\$84,393,644	\$80,710,916	\$81,128,752	\$82,528,565
Grade Span Adjustment	3,021,840	2,902,996	2,917,832	2,968,974
Supplemental Grant	5,395,284	5,160,650	5,187,356	5,276,908
Concentration Grant	-	-	-	-
Add-ons: Targeted Instructional Improvement Block	429,757	429,757	429,757	429,757
Add-ons: Home-to-School Transportation	897,197	923,485	951,928	983,342
Add-ons: Small School District Bus Replacement P	-	-	-	-
Add-ons: Transitional Kindergarten	379,739	390,865	402,904	416,200
Total LCFF Entitlement Before Adjustments, ERT & A	\$94,517,461	\$90,518,669	\$91,018,529	\$92,603,746
Miscellaneous Adjustments	-	-	-	-
Economic Recovery Target	-	-	-	-
Additional State Aid	8,585,843	8,585,843	8,585,843	8,585,843
Total LCFF Entitlement	103,103,304	99,104,512	99,604,372	101,189,589
LCFF Entitlement Per ADA	\$ 13,284	\$ 13,742	\$ 14,164	\$ 14,612
Components of LCFF By Object Code				
State Aid (Object Code 8011)	\$ 8,585,843	\$ 8,585,843	\$ 8,585,843	\$ 8,585,843
EPA (for LCFF Calculation - Resource 1400 / Object	\$ 1,552,333	\$ 1,442,346	\$ 1,406,477	\$ 1,385,051
<i>Local Revenue Sources:</i>				
Property Taxes (Object 8021 to 8089)	\$ 122,705,657	\$ 90,784,549	\$ 95,969,452	\$ 101,466,989
In-Lieu of Property Taxes (Object Code 8096)	-	-	-	-
<i>Property Taxes net of In-Lieu</i>	\$ 122,705,657	\$ 90,784,549	\$ 95,969,452	\$ 101,466,989
TOTAL FUNDING	132,843,833	100,812,738	105,961,772	111,437,883
Enrollment per below	7,487	7,356	7,275	7,230
Total Funding per Student (calculated)	\$ 17,742	\$ 13,705	\$ 14,566	\$ 15,413
Basic Aid Status	<i>Basic Aid</i>	<i>Basic Aid</i>	<i>Basic Aid</i>	<i>Basic Aid</i>
Excess Taxes	\$ 28,188,196	\$ 265,880	\$ 4,950,923	\$ 8,863,244
EPA in Excess to LCFF Funding	\$ 1,552,333	\$ 1,442,346	\$ 1,406,477	\$ 1,385,051
Total LCFF Entitlement	103,103,304	99,104,512	99,604,372	101,189,588

Based on LCFF funding alone, there is an expected drop in per student funding from the current SM-MUSD and the new SMUSD of approximately \$4,000 per student. However, SM-MUSD has significant other unrestricted funds that will remain with SMUSD. As part of the reorganization effort, a calculation was made to determine the overall per pupil unrestricted funding and how much of a contribution from Malibu would be needed to hold the new SMUSD at consistent per student funding. This will be discussed more completely in Criterion #9.

FIGURE 46
MUSD LCFF ENTITLEMENT

	2024-25	2025-26	2026-27	2027-28
SUMMARY OF FUNDING				
General Assumptions				
COLA & Augmentation	1.07%	2.93%	3.08%	3.30%
Base Grant Proration Factor	0.00%	0.00%	0.00%	0.00%
Add-on, ERT & MSA Proration Factor	0.00%	0.00%	0.00%	0.00%
LCFF Entitlement				
Base Grant	\$8,636,188	\$8,889,369	\$9,163,243	\$9,465,525
Grade Span Adjustment	310,827	319,744	329,581	340,549
Supplemental Grant	293,104	307,585	321,236	334,387
Concentration Grant	-	-	-	-
Add-ons: Targeted Instructional Improvement Block Grant	-	-	-	-
Add-ons: Home-to-School Transportation	-	-	-	-
Add-ons: Small School District Bus Replacement Program	-	-	-	-
Add-ons: Transitional Kindergarten	43,078	44,340	45,706	47,214
Total LCFF Entitlement Before Adjustments, ERT & Additional State Aid	\$9,283,197	\$9,561,038	\$9,859,766	\$10,187,675
Miscellaneous Adjustments	-	-	-	-
Economic Recovery Target	-	-	-	-
Additional State Aid	-	-	-	-
Total LCFF Entitlement	9,283,197	9,561,038	9,859,766	10,187,675
LCFF Entitlement Per ADA	\$ 11,688	\$ 12,037	\$ 12,413	\$ 12,826
Components of LCFF By Object Code				
State Aid (Object Code 8011)	\$ -	\$ -	\$ -	\$ -
EPA(for LCFF Calculation - Resource 1400 / Object Code 8012)	\$ 158,857	\$ 158,858	\$ 158,858	\$ 158,858
<i>Local Revenue Sources:</i>				
Property Taxes (Object 8021 to 8089)	\$ 36,811,283	\$ 38,776,637	\$ 40,848,120	\$ 43,031,463
In-Lieu of Property Taxes (Object Code 8096)	-	-	-	-
<i>Property Taxes net of In-Lieu</i>	<i>\$ 36,811,283</i>	<i>\$ 38,776,637</i>	<i>\$ 40,848,120</i>	<i>\$ 43,031,463</i>
TOTAL FUNDING	36,970,140	38,935,495	41,006,978	43,190,320
Enrollment per below	1,016	1,005	993	993
Total Funding per Student (calculated)	\$ 36,406	\$ 38,733	\$ 41,290	\$ 43,480
Basic Aid Status				
Excess Taxes	<i>Basic Aid</i> \$ 27,528,086	<i>Basic Aid</i> \$ 29,215,599	<i>Basic Aid</i> \$ 30,988,354	<i>Basic Aid</i> \$ 32,843,787
EPA in Excess to LCFF Funding	\$ 158,857	\$ 158,858	\$ 158,858	\$ 158,858
Total LCFF Entitlement	9,283,197	9,561,038	9,859,766	10,187,675

When comparing the amount of State aid currently being provided to the School District (\$8.6 million MSA + \$1.8 million EPA) to the calculated, required State Aid for the two new districts, as shown in **Figures 45 and 46**, the new SMUSD and MUSD combined do not require additional State aid as both districts are projected to be Basic Aid.

Additional State Costs for School Facilities

As described in the analysis of Criterion #1 and Criterion #7, both the proposed MUSD and the remaining SMUSD are projected to have declining enrollment and will not need to create school capacity as a result of this proposed reorganization. There is sufficient capacity in existing school

sites to house existing and projected student enrollment. Since the reorganization will not change any school attendance boundaries, there is no anticipated need to construct additional school capacity. Therefore, there would not be an increase in State costs for school facilities.

Further, although some of the sites in both the proposed MUSD and the remaining SMUSD may be eligible for State Modernization funding due to the age of buildings, that would not change due to this proposed reorganization. As such, any eligibility that SM-MUSD has for State Modernization funding would remain the same post-reorganization and apply to the future SMUSD and MUSD.

Categorical and Special Education Program Costs

It is not anticipated that this reorganization will generate any additional categorical or special education program costs that would increase the funding required from the State.

Special Education Transportation Cost Reimbursement

It is not anticipated that this reorganization will create any additional transportation routes or increase the special education transportation cost to the State.

Necessary Small School Funding

This proposed reorganization will not create any Necessary Small Schools that would require additional funding from the State.

Ability to Meet Feasibility Criterion #5:

SM-MUSD is currently a Basic Aid district requiring only minimum State aid. Post-reorganization, both the proposed MUSD and the remaining SMUSD are projected to be Basic Aid. As such, there will not be an increased cost to the State related to general State aid.

Further, given the declining enrollment in both reorganized districts and the available capacity at existing school sites, there is no anticipated school facility cost that would result in an increase in costs to the State.

Finally, there are no other anticipated increases in State costs from categorical programs, special education programs or transportation, or the creation of any Necessary Small Schools. As such, it is reasonable to expect that Criterion #5 could be substantially met.

CRITERION #6: PROMOTING EDUCATIONAL PERFORMANCE

Education Code Section 35753(a)(6):

The proposed reorganization will continue to promote sound education performance and will not significantly disrupt the educational programs in the districts affected by the proposed reorganization.

California Code of Regulations, Title 5, Section 18573(a)(5):

The proposal or petition shall not significantly adversely affect the educational program of districts affected by the proposal or petition. In analyzing the proposal or petition, the California Department of Education shall describe the districtwide programs and the school site programs in schools not a part of the proposal or petition that will be adversely affected by the proposal or petition.

Key Findings:

- Santa Monica and Malibu schools are already independent entities sharing very few resources in terms of academic offerings to students.
- Though Santa Monica High School is a Title 1 school and Malibu High School is not, high school academic outcomes for both schools are remarkably similar, with high graduation rates and low dropout rates.
- Santa Monica students slightly outperform Malibu students on the California Assessment of Student Performance and Progress (CAASPP) and Scholastic Aptitude Test (SAT). In recent years, the difference between Santa Monica and Malibu test scores has widened.
- In several of the CAASPP testing years, there was a larger gap between English Language Arts (ELA) and Math scores in Malibu schools than in Santa Monica schools.

Analysis of Criterion #6:

Improving and focusing the educational program to directly respond to the needs of the Malibu community is a driving factor behind the proposal to separate MUSD from SMUSD. The City of Malibu engaged the services of a highly qualified and respected expert in education to evaluate the educational metrics related to the current SM-MUSD offering and outcomes and make recommendations as to the type of educational program that could be offered by the proposed MUSD. His findings and recommendations are described in this section of the Report.

The educational consultant, Dr. Michael D. Matthews, earned his Bachelor's Degree in International Relations and a Master's Degree in Education at Stanford University. He later earned his

Administrative Services Credential at UC Berkeley and his Doctorate in Education Management at Pepperdine University. During his 37-year career in California public education, Dr. Matthews has served as a high school teacher, a high school principal, an assistant superintendent of human resources, and as a superintendent of schools. He proudly served as the principal of Malibu High School from 1993 to 2004 and is the father of two children who graduated from Malibu High School.

Dr. Matthews utilized data collected through an extensive community-wide visioning process to develop programmatic recommendations that would accurately reflect the desires of the Malibu community. The community-wide visioning process was led by Dr. Judy Chaisson and Holly Sotelo, consultants hired by the City to gather the community of voices regarding the establishment of an independent MUSD through facilitation of focus groups and surveys. The results of this work were memorialized in a report titled, *"Envisioning a Malibu Unified School District: Voices of the Community."*

Current Academic Program at SM-MUSD

Both the Malibu and Santa Monica areas of SM-MUSD have experienced strong academic achievement over the years. While there are a few shared resources, primarily in the areas of elementary music and Special Education, both areas are independent agencies when it comes to academic services provided to students. The distance between the two areas precludes employees from moving from serving Malibu schools to Santa Monica schools in a day. That drive would take an entire preparation period for a teacher on a good day, and that is just one way. Comparing the two independent areas, the high school academic outcomes are remarkably similar, though Santa Monica elementary students outperform those in Malibu elementary schools, particularly in the area of math. An even bigger difference between the two areas manifests itself in the interesting programs offered to Santa Monica students that are not available to Malibu students.

High School Academic Data. Although CAASPP scores certainly do not tell the entire story, they are an essential piece of data that must be examined. **Figures 47-E and 47-M** compare high school achievement, in terms of percentages of students scoring as proficient on the 2018-19 CAASPP, in the Santa Monica and Malibu areas:

FIGURE 47-E

11 th Grade ELA CAASPP	Malibu High School	Santa Monica High School
2019	80.3%	81.3%
2022	82.5%	82.1%
2023	69.2%	83.1%
2024	75.6%	83.8%

FIGURE 47-M

11 th Grade Math CAASPP	Malibu High School	Santa Monica High School
2019	55.4%	56.4%
2022	57.5%	51.1%
2023	32.6%	50.9%
2024	46.5%	56.9%

In terms of ELA, Malibu and Santa Monica students perform well, with just 1% difference between the schools in 2019 and 2022. But in 2023, Malibu High School (MHS) scores dipped, leaving Santa Monica High School (SMHS) having 13% more juniors scoring as proficient. MHS scores improved in 2024, but there is still an 8.2% difference between MHS and SMHS.

Math scores have been a little more volatile for both schools. After scoring similarly in 2019, SMHS experienced a 5% dip in 2022, and 4% more MHS students achieved proficiency. But in 2023, there was a tremendous drop in MHS scores. While there may be an explanation for such a drop, it left only 33% of MHS students scoring proficient. That percentage is below the California average for math scores for that year. In 2023, there was an 18% difference between SMHS and MHS math proficiency. In 2024, that difference was 10%.

Another interesting data set to examine is SAT data. Although the future of the SAT is uncertain, it has long been regarded as the most important statistic that colleges use in deciding to admit students. Without debating the future relevance of the SAT, **Figures 48-E and 48-M** show the data for the two sets of students, as reported by each school's College Profile.

FIGURE 48-E

SAT English	Malibu High School	Santa Monica High School
2019	602	606
2023	588	654

FIGURE 48-M

SAT Math	Malibu High School	Santa Monica High School
2019	597	608
2023	561	665

The data for these tests comes from each high school's *School Profile*, and the profile on Malibu's website is more up-to-date than that on Santa Monica High's. It is interesting that in 2019, Santa Monica High's scores were slightly higher in English and math. And on the more recent tests, Santa Monica High's scores are *significantly* higher than Malibu High's scores, particularly in math.

A third set of data to consider comes with Advanced Placement scores. Schools offering advanced course work to students can choose between Advanced Placement (AP) courses or International Baccalaureate (IB) courses. Both MHS and SMHS offer AP courses. **Figure 49** reflects differences in AP programs between the two schools, as reported by each school's College Profile.

FIGURE 49 (2021)

AP Courses	Malibu High School	Santa Monica High School
Number of Courses Taught	17*	20
% Of Seniors Taking AP Courses	54%	49%
% Of AP Tests Scoring 3, 4, or 5	79%	74%

FIGURE 49 (2024)

AP Courses	Malibu High School	Santa Monica High School
Number of Courses Taught	17*	22
% Of Seniors Taking AP Courses	Not reported	Not reported
% Of AP Tests Scoring 3, 4, or 5	75%	73%

* Three different AP Art courses are being taught in the same period, making it a challenging teaching environment.

Malibu students have fewer AP course opportunities than Santa Monica students, while a slightly higher percentage of Malibu students take the AP test than Santa Monica students, and a slightly higher percentage of Malibu students score a 3, 4, or 5 on AP Exams than Santa Monica students. One interesting new development is that the College Board now recognizes 30% of high schools for their work creating AP programs that are delivering results for students while broadening access. Both schools have been honored with this recognition. SMHS earned a gold award, given only to the top 12% of high schools, while MHS received a silver award, earned by the top 21% of high schools. Both schools also earned the *AP Access Award*, “honoring schools that demonstrate a clear and effective commitment to equitable access to advanced coursework.”

Finally, both high schools have strong data when it comes to graduation rates and dropout rates. As reported by their 2023 School Accountability Report Cards (SARCs), at SMHS, the adjusted cohort graduation rate was 96.4%, while the four-year dropout rate was 2.0%. At MHS, the adjusted cohort graduation rate was 96.0%, while the four-year dropout rate was 2.0%.

Middle School Academic Data. Because there are fewer sources of comparative data in middle school and elementary school, CAASPP scores are the only common data that can be compared. **Figures 50-E and 50-M** compare middle school* student achievement on the CAASPP, in terms of percentages of students scoring as proficient on the 2018-19 CAASPP, in the Santa Monica and Malibu areas:

FIGURE 50-E

ELA CAASPP	Malibu Middle School	Lincoln Middle School (in Santa Monica)	John Adams Middle School (in Santa Monica)
2019	73.1%	79.3%	54.5%
2022	78.1%	80.7%	65.5%
2023	61.8%	78.9%	64.2%
2024	68.7%	79.2%	61.8%

FIGURE 50-M

Math CAASPP	Malibu Middle School	Lincoln Middle School (in Santa Monica)	John Adams Middle School (in Santa Monica)
2019	53.8%	69.6%	38.1%
2022	51.4%	64.8%	42.3%
2023	50.6%	60.7%	45.0%
2024	52.1%	64.9%	43.3%

* This report uses only 8th grade achievement because prior to 2019-20, Malibu Middle School scores were reported with Malibu High School.

In 2019, Malibu students scored lower than students at Lincoln Middle School (in Santa Monica), and higher than students at John Adams Middle School (in Santa Monica). Over the last few years, John Adams Middle School's scores have risen, while Malibu's and Lincoln's scores have declined. And in 2023, John Adams Middle School scores in ELA were higher than Malibu's. The most significant data on this table is the vast gap between students achieving proficiency in ELA when compared to math. In 2019, the gap was only 9.7% at Lincoln, then 16.3% at John Adams, then 19.3% at Malibu. In 2022, the gap was 15.9% at Lincoln, 23.2% at John Adams, and 28.6% at Malibu. In 2024, that gap was only 10.4% at Lincoln, while it was 19.6% at John Adams, and 16.6% at Malibu.

Elementary School Academic Data. Again, because there are fewer sources of comparative data in middle school and elementary school, CAASPP scores are the only common data that can be compared. **Figure 51** compares student achievement on the CAASPP, in terms of percentages of students scoring as proficient on the 2018-19 CAASPP at nine schools, the three schools in Malibu (noted as "M" in Figure 51), and seven schools in Santa Monica (noted as "SM" in Figure 51).

FIGURE 51 (2019)

2018-19 CAASPP Scores	ELA	Math		Rank by ELA	Rank	Rank by Math
Juan Cabrillo (M)	67.9%	56.6%		Franklin (SM)	1	Franklin (SM)
Point Dume (M)	82.5%	64.1%		Pt. Dume (M)	2	Roosevelt (SM)
Webster (M)	76.0%	69.2%		Roosevelt (SM)	3	Grant (SM)
Edison (SM, Title 1)	71.9%	58.7%		Grant (SM)	4	Webster (M)
Franklin (SM)	90.0%	88.2%		Webster (M)	5	Rogers (SM)
Grant (SM)	78.1%	73.1%		McKinley (SM)	6	Pt. Dume (M)
McKinley (SM, Title 1)	73.7%	62.2%		Edison (SM)	7	McKinley (SM)
Muir (SM, Title 1)	55.8%	42.5%		Cabrillo (M)	8	Edison (SM)
Rogers (SM, Title 1)	66.0%	64.0%		Rogers (SM)	9	Cabrillo (M)
Roosevelt (SM)	81.8%	77.1%		Muir (SM)	10	Muir (SM)

FIGURE 51 (2023)

2022-23 CAASPP Scores	ELA	Math		Rank by ELA	Rank	Rank by Math
Juan Cabrillo (M)	Closed	Closed		Franklin (SM)	1	Franklin (SM)
Malibu (M)	68.3%	61.9%		Webster (M)	2	Webster (M)
Webster (M)	79.5%	72.3%		Grant (SM)	3	Grant (SM)
Edison (SM, Title 1)	72.5%	68.7%		Roosevelt (SM)	4	Edison (SM)
Franklin (SM)	84.4%	84.8%		Edison (SM)	5	Roosevelt (SM)
Grant (SM)	73.9%	72.0%		Malibu (M)	6	McKinley (SM)
McKinley (SM, Title 1)	67.7%	62.3%		McKinley (SM)	7	Malibu (M)
Muir (SM, Title 1)	Closed	Closed		Rogers (SM)	8	Rogers (SM)
Rogers (SM, Title 1)	55.7%	48.3%				
Roosevelt (SM)	72.5%	63.6%				

FIGURE 51 (2024)

2022-23 CAASP Scores	ELA	Math		Rank by ELA	Rank	Rank by Math
Juan Cabrillo (M)	Closed	Closed		Franklin (SM)	1	Franklin (SM)
Malibu (M)	61.7%	61.0%		Webster (M)	2	Webster (M)
Webster (M)	79.8%	79.5%		Roosevelt (SM)	3	Grant (SM)
Edison (SM, Title 1)	73.8%	69.6%		Grant (SM)	4	Edison (SM)
Franklin (SM)	84.6%	83.4%		Edison (SM)	5	Roosevelt (SM)
Grant (SM)	76.4%	70.1%		McKinley (SM)	6	McKinley (SM)
McKinley (SM, Title 1)	62.8%	62.5%		Malibu (M)	7	Malibu (M)
Muir (SM, Title 1)	Closed	Closed		Rogers (SM)	8	Rogers (SM)
Rogers (SM, Title 1)	55.3%	47.1%				
Roosevelt (SM)	78.0%	69.2%				

There are a few takeaways from this data:

- In 2019 and 2023, there was a significant gap in achievement (9% or more) between math and ELA scores in the Malibu elementary schools.
- The 2024 data shows that the gap between ELA and Math scores in the two Malibu schools has closed. The reason for that at Malibu Elementary is because ELA scores have dropped. Malibu Elementary School now has the second lowest ELA and Math scores in the District.

Conclusions from Academic Data Review. From the outside looking in, it is easy to assume that Malibu and Santa Monica are both exotic communities where stars live and play. But that is not the reality. This study does not address the perception of the Malibu and Santa Monica lifestyle; it addresses the schools, the students, the employees, and the parents invested in the schools. All of the schools in SM-MUSD, both Santa Monica schools and Malibu schools, have students who require significant support.

But this data reveals that there are significant challenges in Malibu, and those require particular attention:

- Though Santa Monica High School is a Title 1 school and Malibu High School is not, Santa Monica students achieve at a significantly higher rate than those in Malibu.
- Scores in Malibu schools are declining at a faster rate than scores in Santa Monica schools, and though they may be a short-term aberration, recent declines in math scores at Malibu High School are particularly alarming.

Both Malibu and Santa Monica are communities that have the resources to provide a world class education for their students. Seeing such a difference between the achievement in the two communities leads us to believe that more attention should be given to teaching and learning in the Malibu schools. Whatever the reasons are for this, the Malibu community firmly believes that a new Malibu Unified School District would focus on what is and is not working in the Malibu schools and take the necessary steps to improve student achievement.

Program Quality Of Academic Courses In Santa Monica And Malibu

All Malibu and Santa Monica schools offer high quality academic programming for students in traditional grades and traditional subjects. Yet there are several areas where, due to a variety of factors, there are fewer course selections offered to Malibu students than are offered to Santa Monica students. In examining the *Envisioning a Malibu Unified School District: Voices of the Community* Report, the Malibu community would like Malibu students to access many new programs already available to students in Santa Monica, including:

- Career Technical Education (CTE) Opportunities
- Expanded Advanced Placement or International Baccalaureate Opportunities
- Language Immersion Program
- Alternative Elementary School Configurations
- Elementary Arts
- Alternative/Independent Study/Continuation School Options for Students

Beyond the traditional academic classes offered to all SM-MUSD students, there are several programs offered only to Santa Monica students that should be explored and possibly offered to Malibu students. Through school district reorganization, Malibu students could receive a richer, specialized and more targeted curriculum with increased course offerings. This would likely result in higher academic achievement and better preparedness for college and the workforce.

Career Technical Education. One of the best aspects of the high school program in Santa Monica is the Career Technical Education (CTE) program. This long-standing program has provided CTE (formerly known as ROP) opportunities to Santa Monica students for decades. For a variety of reasons, primarily geographical, students who live in Malibu have not been able to participate in those classes. The SM-MUSD website describes the robust CTE offerings available to students, but **all** of the CTE pathways and courses are offered only at Santa Monica High School.

While the smaller size of Malibu High School means that the same breadth of courses may not be possible, and while the talents and expertise in the Malibu community may differ from that of the Santa Monica community, much more could be offered to the students of Malibu. One of the recommendations for the new MUSD Board of Education will be creating CTE Pathways offerings for Malibu students. According to the *Envisioning a Malibu Unified School District: Voices of the Community* Report, the Community would like to see a Multimedia CTE pathway and a more defined Engineering CTE pathway. The robust Santa Monica CTE program could continue without suffering, and a new and more limited Malibu program would be a welcome addition. Although Malibu High

School is a relatively small school, the proposed MUSD would have sufficient resources for such a program and could create the facilities needed to support this type of program.

Advanced Placement (AP) vs. International Baccalaureate (IB). As described in the Envisioning a Malibu Unified School District: Voices of the Community Report, many in the community would like the proposed MUSD Board of Trustees to examine both the IB program and the AP program. There is some frustration among students and parents about AP courses not offered at Malibu High School. One of the challenges of being a small school is that curricular choices can be more limited than in larger schools. The new MUSD Board would need to determine if Malibu High School would move from an AP school, where students can choose which AP courses to take, or become an IB school, where students take the same pathways that students around the world are taking. In either case, some additional funds would be needed to provide the courses for students.

The AP program at Santa Monica High School would not suffer as a result of the proposed separation, as they have the student enrollment to fill a wide variety of classes.

Language Immersion Programs. The Envisioning a Malibu Unified School District: Voices of the Community Report details interest in a language immersion program beginning in elementary school. The success of the Edison Language Academy in Santa Monica has demonstrated that students enrolled in a language immersion program not only become fluent in a second language, but their language skills in their native language improve as much or higher than students in non-immersion programs.

It would be challenging to have an entire elementary school devoted to dual-language immersion, but one of the elementary schools could definitely build a program with one bilingual teacher at each grade level. Such a program could only be implemented if the parental demand for the classes was sufficient to offer one teacher at each grade level at one of the schools. While there would be some additional funding necessary for startup costs, the eventual costs should mirror the expenses at the Edison Language Academy in Santa Monica, and the thriving Edison Language Academy would not be harmed by the new addition in Malibu.

Restructuring Elementary Schools to Provide More Opportunities for Students. Over the past decade, enrollment has declined in Malibu's elementary schools. Juan Cabrillo Elementary School closed in 2019, and their students joined the former Point Dume Elementary School to become Malibu Elementary School. That leaves two elementary schools in Malibu: Malibu Elementary and Webster Elementary. But both schools are still relatively small, which makes for challenging staffing that results in a higher percentage of grade combination classes than most elementary schools offer. One option for staff and the proposed MUSD Board of Education to consider would be the possibility of having all students in grades TK-2 attend one of the elementary schools and having all students in grades 3-5 attend the other. Having more students in each grade would provide more social opportunities for students, better staffing ratios for staff, and more academic options for students.

While there are clear academic advantages to this, it would inconvenience families in terms of transportation and proximity to their children's schools. This would be yet another matter for the proposed MUSD Board of Education to determine after garnering input from the Malibu community.

Elementary Arts. The SM-MUSD Elementary Music Program is the gold standard for elementary music programs in California. Input from Malibu stakeholders has been strongly in favor of ensuring Malibu students have access to not only a high quality music program, but also to provide a more complete visual and performing arts (VAPA) experience from TK-12. The proposed MUSD Board of Education will need to examine what is possible, using District funding, local fundraising, and resources from the Malibu community where the arts are a high priority. Again, because the music program is a SM-MUSD district office program, and because there are fewer schools and students to serve, there would need to be a commensurate reduction in the remaining SMUSD music department, and that staffing would presumably become part of the proposed MUSD district office staffing.

Continuation/Alternative/Independent Study School. Students in Santa Monica and Malibu have long had access to Olympic Continuation High School. While the enrollment at Olympic has been on the decline, it has always been important for students, especially high school students not experiencing success in a traditional school setting, to have options. While Santa Monica elementary and middle students have long had access to the Santa Monica Alternative Schoolhouse (SMASH), Malibu students have not. Malibu students have access to an independent study program, which does meet the needs of some students. Beginning in 2019, Olympic is now one of several alternative experiences housed under the new Barack and Michelle Obama Center of Inquiry and Exploration. The Obama Center includes an independent study program, and the new Personalized Learning Project Based Learning Pathway, which accepts 100 students a year.

Having local options for Malibu students would provide the necessary support for Malibu students looking for a different pathway towards success. Because there is no full Santa Monica College (SMC) option in Malibu, the proposed MUSD Board of Education may seek to establish an online-based relationship with SMC or some other college to provide independent options for Malibu students.

The alternative programs housed in the Barack and Michelle Obama Center of Inquiry and Exploration and the program at SMASH will not be impacted, as student enrollment should not be diminished by the separation of the two districts.

Students With Disabilities. One of the non-negotiables in this separation effort is that it will have no bearing on Malibu students with disabilities. Each and every student in the SM-MUSD Special Education program is being provided with agreed-upon accommodations and modifications that are spelled out in each student's Individualized Educational Program (IEP). Whether SM-MUSD continues intact, or MUSD and SMUSD are the new entities, each district will continue to implement the legally required and agreed-upon IEPs.

SM-MUSD currently partners with Beverly Hills and Culver City school districts to share resources to help meet the needs of all students with disabilities. Together, this Tri-City Special Education Local Plan Area (SELPA) collaborates to coordinate resources and provide other support that is needed to support all students. While the name even now should be the Four-City SELPA, Malibu schools have a long tradition of being part of this cooperative, and Malibu students have benefited from this SELPA. The proposed MUSD Board of Education could continue in that SELPA, or they could petition to join the Ventura County SELPA. Las Virgenes Unified School District is another Los Angeles County school district in that SELPA.

Whatever the decision, everyone is clear that the proposed MUSD will do what is necessary to properly implement each student's IEP and the remaining SMUSD will be able to continue to implement each student's IEP.

English Learner Students And Their Families. There is a decline in the percentage of English Learner (EL) students in as they move from elementary to middle to high school. In elementary school, EL students comprise approximately 8% of the school population. In middle and high school, that percentage is reduced to 6%. One of the critical questions for the new MUSD Board is to examine how to support EL students in every step of their journey.

One of the reasons for the dramatic decrease in Malibu secondary schools could be the lack of support classes for EL students. Between both Malibu High School and Malibu Middle School, there is only one middle school class devoted to supporting EL students. There are no after school support systems for EL students. High school is challenging, and the proposed MUSD would seek to provide the support EL students need to learn English and to thrive in high school courses.

MUSD would take the steps and allocate the budget necessary to better meet the needs of EL students and their families in elementary, middle, and high schools, offering multiple opportunities during and after the school day for EL students to receive the support they need to succeed. In addition, the proposed MUSD District Office will need to regularly provide high quality professional development to help all teachers provide EL students with the most effective teaching strategies and learning environment.

The proposed reorganization would have no impact on the EL students at Santa Monica area schools.

Providing a Local Supportive District Office. As described above, the proposed MUSD Board will need to examine the reasons behind the discrepancy between math scores in Santa Monica and math scores in Malibu. Whatever the reason, this report recommends that the proposed MUSD Board seek the input of teachers and take steps to implement a high-quality long-term math professional development program. As reported by teachers in the Envisioning a Malibu Unified School District: Voices of the Community Report, professional development offerings from a district office so far away can be problematic for Malibu teachers. The proposed MUSD can offer long-term nearby district office support that uses Malibu student achievement data and the valuable input of Malibu teachers.

The 40-minute drive (without significant traffic) between most of the Malibu schools and the SM-MUSD district office creates challenges in areas where district support is critical. While the quality of support in the SM-MUSD District Office is very high, the distance makes it challenging to effectively utilize that support for Malibu school site staff. Malibu principals must be one hour away from campus for any principal meetings or professional development sessions. Every principal knows that the next crisis could happen any time, and to be that far away from being able to provide support is stressful. For Malibu teachers to attend an after school or partial day professional development session is equally challenging, as the distance and the unpredictable driving times mean that Malibu teachers are missing more valuable class time than more local Santa Monica teachers. And while teachers appreciate quality professional development opportunities, no teacher wants to be out of the classroom more than is absolutely necessary.

Although it does not relate to academics, a local district office could be more supportive in every area, including areas such as payroll, human resources, maintenance and operations, and student services. Currently, Santa Monica houses all district-wide programs in SM-MUSD. Because there would be a reduction in the number of schools, employees, and students served, the remaining SMUSD District Office staffing and funding would need to be decreased from the current level of funding. Conversely, the proposed MUSD District Office would need to be created and appropriately staffed.

Community Visioning Survey Data

A review of the outcomes of the survey data found in *Envisioning a Malibu Unified School District: Voices of the Community* by Judy Chiasson, PhD, and Holly Priebe Sotelo, MSW shows overwhelming local support for an independent MUSD. The report identifies findings in three key areas that are summarized in more detail below:

- Pillars of Leadership Primary Values
- Pillars of Student Success
- Pillars for Academic Programming

In January 2022, the City of Malibu received a report on the findings from its survey of the Malibu community. The survey was offered in English and Spanish, and there was good response to the survey with 517 respondents. In addition, Dr. Chiasson and Ms. Sotelo held seven focus group meetings, speaking to 88 community members in depth. Some facts about the respondents include:

- 67% identified as White.
- 28% of respondents were Spanish speakers.
- 97% lived in Malibu, worked in Malibu, or had children attending a Malibu school.
- 91% of those surveyed fully endorsed the establishment of an independent MUSD.
- Of the remaining 9%, half opposed, and half were undecided.
- The most prevalent reason for being opposed to a new MUSD was the concern that the new district would not have sufficient financial resources.
- 16% of respondents had children who receive special education services.

Of the 91% in favor of an independent MUSD, they supported it for the following reasons:

- **Local Control and Accountability.** Having only one Malibu board member currently serving on the seven-member SM-MUSD Board, and not always having Board representation at all, has placed Malibu in an extreme minority. Residents want much more of a voice in the design and oversight of local schools.
- **Inequity.** Santa Monica facilities are far better than Malibu facilities. Santa Monica students have access to far more academic offerings than Malibu students. Revenue from Malibu property is routed to Santa Monica in such a way that those inequities are not remedied.
- **Lack of Caring.** Respondents felt that SM-MUSD leaders, with the exception of those from Malibu, have been insensitive to or dismissive of Malibu's needs.
- **Distant and Distinct Communities.** Respondents expressed that the needs of a semi-rural Malibu are far different than those an urban and suburban Santa Monica. The distance between the two communities, and the traffic that exacerbates that distance, prevents students in the two communities from accessing resources in the other community.

As mentioned above, stakeholder input from the *Envisioning a Malibu Unified School District: Voices of the Community* Report, teachers commented on the challenges of being supported by a District that is 21 miles away, but in reality, a 40-minute to 60-minute drive, depending on traffic. The proposed MUSD Educational Services Department would require a budget that targets improving TK-12 math instruction. While the proposed MUSD Board of Education could begin by using the same curriculum and materials approved by the SM-MUSD Board of Education, they would have the option to get recommendations from teachers and input from the community to enhance or update those materials. Having a well-supported and local Educational Services Department could provide teachers with the support they need to implement the best practices consistently in all classrooms.

The following summarizes the **hopes and desires** of the Malibu community for a new MUSD as described in the *Envisioning a Malibu Unified School District: Voices of the Community* Report.

The **Pillars for Leadership Primary Values** of a new MUSD, according to respondents, include:

- **Transparency in Decision Making:** Transparency in decision making requires robust internal and external disclosures, an open book policy, regular communication to stakeholders, and a Superintendent and Board Members who are accessible. It includes the entire Malibu community collaborating in a shared process of decision-making in conflict engagement with an ombudsperson to facilitate the process while following the Brown Act.
- **Responsiveness to Families:** Malibu prioritizes family engagement throughout all processes and recognizes them as partners in their child's learning and development. All stakeholders – family, students, staff, community – have a seat at the table where their needs are taken into account and where unity and diversity are recognized. Stakeholders feel seen, appreciated, valued, and acknowledged. The School Site Council meetings are recognized as vital arteries for the family-school engagement process.
- **Fiscal Responsibility:** We believe in balanced budgets and living within our means. We believe in creative solutions to financial hurdles and antiquated school programs. Fiscal decisions should be made in a transparent, responsible manner with community input. Our fiscal priorities are the classroom and a fair and equitable salary structure for teachers.
- **Responsiveness to Employees:** School employees are vitally important parts of the community and the culture of education. Both certificated and classified staff should have a

strong voice and regular opportunities to engage with leadership. We believe in professional development and encourage teachers to express new ideas.

- **Effective Communication:** Malibu leaders are direct, good communicators who share information in a digestible and accessible way, so the community is fully informed about the decisions that are under consideration.

The **Pillars for Student Success** of a new MUSD, according to respondents, include:

- **Social Justice Advocacy:** We believe in developing and implementing a more socially just society by focusing on identity, diversity, justice, and action; and by using the social justice standards throughout every area of school experience at all grade levels.
- **Visual and Performing Arts:** Creative exploration is a vehicle for learning and enriches students with the ability to see the beauty of the world, the beauty in others, and the beauty in themselves. Malibu prides itself on its world class visual and performing arts we achieve through active participation from local music and arts professionals across the K-12 spectrum.
- **Athletics:** Sports, athletics, and physical activity are part of a healthy lifestyle. We emphasize individual and collective athletics from the earliest grades – to develop mind, spirit, and body and build well-rounded adults able to achieve individually and work well collaboratively. Malibu's world class facilities will help to recruit and retain top-tier staff.
- **Language Skills:** Malibu is a part of the global society and recognizes the value of being multilingual. We offer immersive and collaborative language learning opportunities through students' academic years. Our English Language Learners are strongly supported to ensure English proficiency and academic success.
- **Think Global and Act Local:** Malibu students are future global leaders who will develop into positive contributors to society and accurately practice mindfulness at the local level. Our project-based learning is built on the principles of TIDES – Technology, Innovation, Design, Enterprise, and Sustainability.

The **Pillars for Academic Programming** of a new MUSD, according to respondents, include:

- **Specialized Academies:** Specialized academies offer unique learning opportunities for students. Malibu's academies could include STEM, including Marine Sciences or Engineering, Language Immersion, or Multimedia.
- **Independent Study:** Independent study is an option for students who need flexibility, such as actors, dancers, artists, and athletes. A dedicated coordinator actively checks with students on their progress and needs
- **International Baccalaureate:** Malibu is very interested in exploring an International Baccalaureate program and wishes to offer alternatives to Advanced Placement for secondary achievement.
- **Multimedia Production:** Malibu is proud of its state-of-the-art theater, arts, and multimedia production program. Our program is enhanced by the generosity and support of community mentors and providers.

Advantages Of A Locally Controlled School District

A locally controlled school district will have the following advantages:

- True representation of the Malibu community

- More understandable budgets
- Finalization of steps already taken that recognize the unique nature of the Malibu pathway and community

The political advantages of a locally controlled district are easy to see. For the first time, Malibu residents will have representation on a school board that is responsive and accountable to the citizens of Malibu. No longer will Malibu have a lone representative (or sometimes no representatives for years at a time) on a school board. No longer will most or all of the other school board members live 15-20 miles away from Malibu schools. PTA Council meetings will not be so distant from the Malibu PTA leaders. Not only will this make the citizens of the community feel more connected to the school district, and not only will that connection lead to increased volunteerism, but it will also help employees feel more connected as well.

The economic advantages of a locally controlled district revolve around a simpler budget that is more understandable. No longer will there be questions from either Santa Monica or Malibu residents about whether either community is receiving as much as they should or more than they should. School district budgets are public, but that does not make them simple to understand. No longer will there be questions about the distance being the cause of overdue work orders. No longer will there be questions over whether the decision not to hire an additional employee is in line with decisions being made in schools in the other community. The lack of representation, and Malibu's distance from the district office, invites these questions and more.

SM-MUSD has already taken steps that acknowledge the unique needs of the Malibu and Santa Monica communities and pave the way for this separation. For example, the most recent bond elections were organized with this separation in mind. In 2024, Santa Monica voters passed a \$495 million Santa Monica-only bond (Measure QS), and Malibu voters passed a \$395 Malibu-only bond (Measure MM). The previous bond measures from 2018 also were passed separately in each community.

Also in 2018, the Santa Monica-Malibu Education Foundation (SMMEF) became the Santa Monica Education Foundation (SMEF), dedicated to raising funds only for the Santa Monica community. According to the SMEF website, *"On June 28, 2018, the School Board approved a revision to Board Policy 3290 that changed the structure of fundraising in our district. It designated the Ed Foundation to raise funds for district-approved programs in Santa Monica schools and authorized a separate Malibu-based nonprofit to raise funds for the same programs in Malibu schools."* Eventually, in April 2024, Malibu formed its own educational foundation to support local initiatives.

For decades, there have been three educational pathways in SM-MUSD. The John Adams and Lincoln Pathways all lead to Santa Monica High School, while the Malibu Pathway leads to Malibu High School. The SM-MUSD organizational structure reflects these divisions and the unique needs of each pathway. With the proposed school district reorganization, the Malibu community will be able to make decisions related to its own pathway and improve the educational program offerings available to its own students.

Ability to Meet Feasibility Criterion #6:

The proposed unification will not alter the school attendance boundaries, and each future reorganized district will have sufficient per pupil funding to continue to at least offer the educational programs currently offered at existing school sites. It is reasonable to expect that the proposed reorganization will not significantly disrupt the educational programs in the affected districts and will continue to promote sound educational performance. Further, the reorganization will provide the proposed MUSD with an opportunity to focus upon and enhance the programs offered, as well as provide programs specifically desired by the Malibu community. Therefore, it is reasonable to expect that Criterion #6 can be substantially met.

CRITERION #7: SCHOOL HOUSING COSTS

Education Code Section 35753(a)(7):

Any increase in school facilities costs as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.

Key Findings:

- There is no anticipated increase in school facilities cost since the reorganization will not alter the school attendance boundaries and there is sufficient space on campuses to house existing students.
 - With projected declining enrollment, there is not an anticipated future capacity need.
- The proposed MUSD would need to create space for Independent Study and Alternative Education programs.
 - With the available space on the Malibu Middle/Malibu High campus, it is anticipated that such space can be created using existing facilities.
- A new MUSD would need to create a District Administrative Office, with other support spaces such as a Maintenance/Operations/Transportation facility, technology center, and central kitchen.
 - It is anticipated that all of these facilities can be created on the existing Malibu Elementary campus with minimal facilities costs.

Analysis of Criterion #7:

As previously stated, the proposed reorganization will not alter the school attendance boundaries for any campus. SM-MUSD currently has the capacity to accommodate all students in its existing facilities and is expected to be able to continue to do so with projected declining enrollment. As such, there is no expected increase in school facilities cost to accommodate the future student population of either the proposed MUSD or the remaining SMUSD.

Figure 52 shows the current enrollment at each school site and the estimated school site capacity. The capacity of each site was determined based on the State loading standards of 25 students per classroom for Kindergarten through 6th grade and 27 students per classroom for 7th through 12th grade. The proposed MUSD would have an estimated capacity for 2,345 students, and the remaining SMUSD would have an estimated capacity for 10,076 students.

FIGURE 52

School Site Enrollment and Estimated Capacity		
School Site	2023-24 Enrollment	Estimated Capacity
Malibu Unified School District		
Malibu Elementary	191	425
Webster Elementary	205	525
Malibu Middle	247	620
Malibu High	390	1,000
Total Malibu Unified School District	1,033	2,570
Santa Monica Unified School District*		
Edison Language Academy	395	475
Franklin Elementary	612	700
Grant Elementary	570	600
McKinley Elementary	393	475
Roosevelt Elementary	588	850
Santa Monica Alternative School House	219	275
Will Rogers Elementary	523	550
John Adams Middle	808	1,080
Lincoln Middle	884	1,300
Olympic High	32	190
Santa Monica High	2,573	3,190
Total Santa Monica Unified School District	7,597	9,685
* Does not include Independent Study and Non-Public School totalling 11 students.		

Source: Santa Monica-Malibu Unified School District.

The proposed MUSD does not have an alternative school within its boundaries. To accommodate those students who require alternative schooling, there may be a need to reconfigure some classrooms on the existing high school site in order to accommodate alternative education programs in the future. Given the available space on the Malibu High/Malibu Middle School campus, it is reasonable to expect that alternative education classrooms could be located there without an additional facility cost by utilizing some of the existing classrooms on site. Some classrooms on the High School campus could also be used for an Independent Study program.

A new MUSD would need to create an administrative space for District Office staff as well as a maintenance yard and central kitchen. MUSD could utilize existing portables that are currently located on the Malibu High/Middle School campus and relocate them to the Malibu Elementary School campus without a significant facilities cost. This will create sufficient space to accommodate the MUSD district office staff positions that are budgeted in the proposed MUSD budget.

The existing Cafetorium at Malibu High/Middle School can be used as a central kitchen for MUSD.

Bonding Capacity

As part of the assessment of school housing costs, the CDE Handbook indicates that consideration should be given to the bonding capacity of the reorganized districts. Bonding capacity of a unified school district is equal to 2.5% of its total assessed value. As shown in **Figure 53**, both the proposed MUSD and the remaining SMUSD would have significant remaining bonding capacity post-reorganization, even accounting for the \$1.1 billion of bonds outstanding.

FIGURE 53

Bonding Capacity			
	Current Capacity Santa Monica-Malibu USD	New Capacity Malibu USD*	New Capacity Santa Monica USD**
2024-25 Assessed Value	\$50,946,893,301	\$27,211,829,327	\$50,904,714,966
Bonding Capacity (AV x 2.5%)	\$1,273,672,333	\$680,295,733	\$1,272,617,874
Outstanding Bonds	\$1,098,535,103	\$420,849,983	\$677,685,120
Net Bonding Capacity	\$175,137,230	\$259,445,750	\$594,932,754
*Includes all bonds outstanding for SFID No. 2 Election 2018 and a pro rata share of all Districtwide bonds.			
** Includes all bonds outstanding for SFID No. 1 Election 2018 and a pro rata share of all Districtwide bonds.			

Source: Los Angeles County Auditor-Controller.

Developer Fees

Another consideration described in the CDE Handbook is the impact the proposed reorganization may have on income from developer fees. The remaining SMUSD will continue to collect developer fees from residential and non-residential new construction within its boundaries. Since developer fees are calculated based on how much available capacity a school district has to accommodate the anticipated students from the development, with the elimination of Malibu area schools, SMUSD may find it easier to justify a developer fee. Essentially, the Malibu schools have a significant amount of available capacity. This available capacity reduces the amount that a district can justify collecting from new development as new school capacity is not needed to accommodate students from new development. However, developer fees for schools in California are capped at a statutory maximum. So, it is likely that there will be no change in the amount of fees that SMUSD can ultimately charge.

For MUSD, there is significant available capacity to accommodate students and a community with minimal plans for development. The proposed MUSD may not be able to even justify charging a developer fee as it is unlikely the new district will be spending money on new school capacity.

Condition of Existing Facilities

The CDE Handbook indicates that the condition of school facilities should be considered as part of the analysis for Criterion #7. The analysis related to Criterion #3 in this report described the City of Malibu's assessment of its existing facilities. Essentially, the Malibu schools are in relatively good condition and current improvement plans will address any concerns identified, specifically at Malibu

High/Middle School. It is not anticipated that a significant financial investment will be needed to modernize Malibu schools beyond the currently planned SFID No. 2 bond projects.

State School Facility Program

Finally, the CDE Handbook states that it should be determined how the loss and gain of pupils will affect the school districts' eligibility for the State School Facility Program. Eligibility for the State School Facility Program New Construction funding is based on a school district's need to build additional capacity to house students. With a declining enrollment district, it is unlikely that SM-MUSD has much, if any, eligibility for State New Construction funding. The proposed reorganization will not change either the MUSD's or SMUSD's eligibility for new construction funding.

The State Modernization program funding is based on the age of facilities to be modernized. If permanent buildings are 25 years old or older and portable classrooms are 20 years old or older, they likely have eligibility for State Modernization funding. The age of the school buildings will not change with the proposed reorganization. The modernization eligibility for Malibu area schools would be transferred to the proposed MUSD and the modernization eligibility for Santa Monica area schools would stay with SMUSD. No changes in the eligibility amount would occur due to this proposed reorganization.

Ability to Meet Feasibility Criterion #7:

Reorganization will not impact the school attendance boundaries of the existing District and school site capacity at each site is currently sufficient to house existing students. With declining enrollment at both reorganized districts, it is not anticipated that additional school capacity will be needed. Further, although the proposed MUSD will need classroom space to accommodate alternative education students, it is expected that this can be accomplished on the existing Malibu Middle/Malibu High School campus. Only minimal facilities expenditure is anticipated to create the support facilities needed for a new school district and this can be completed on the Malibu Elementary campus. Therefore, it is reasonable to expect that Criterion #7 can be substantially met.

CRITERION #8: PROPERTY VALUES

Education Code Section 35753(a)(8):

The proposed reorganization is primarily designed for purposes other than to significantly increase property values.

Key Findings:

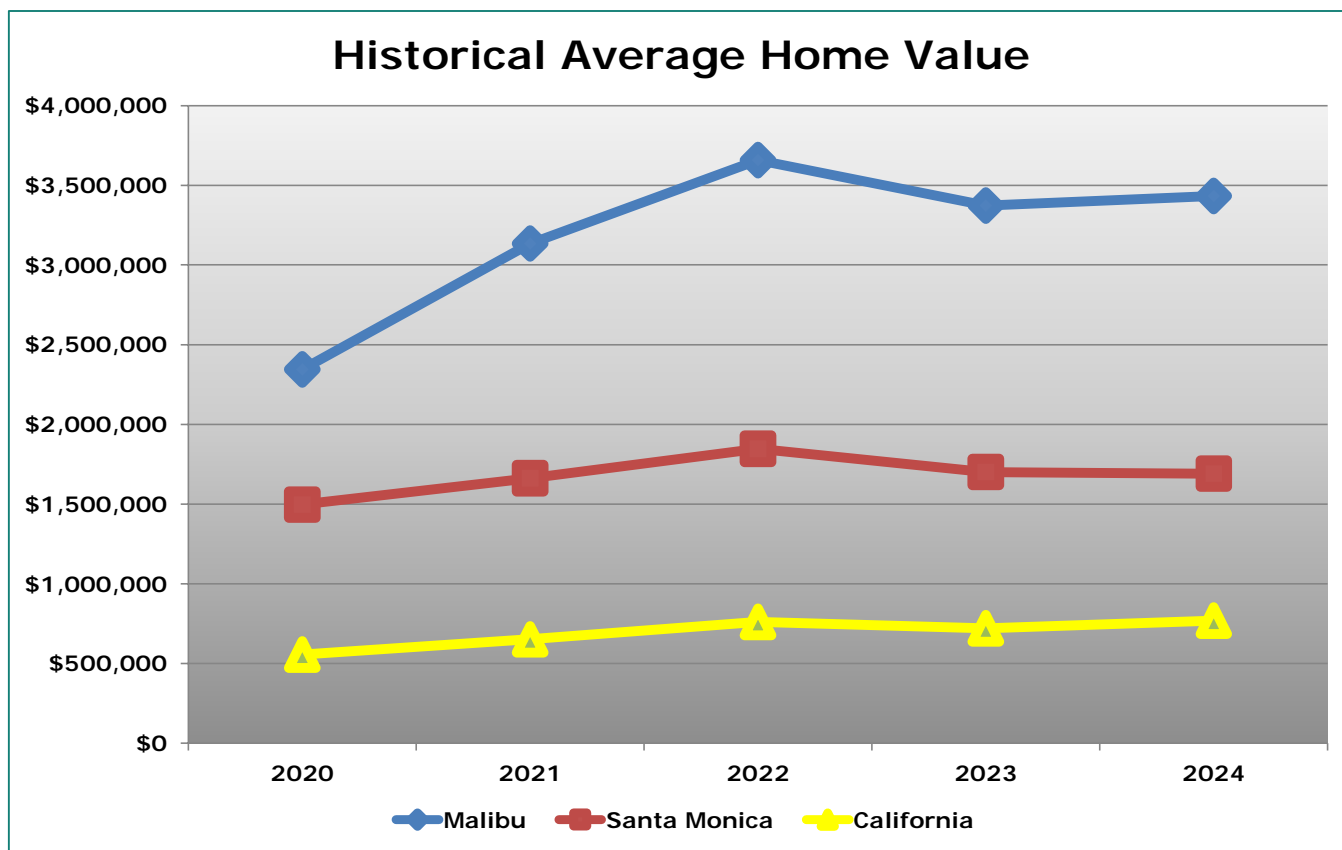
- There is no indication that a significant increase in property values will result as a product of the reorganization.
 - Although property values in the Malibu area are high, the reorganization itself will not drive further increases in property values as the Malibu area has other independent factors driving the high property values.
 - Further, property values in Santa Monica are high as well compared to the State average and are not dependent on the Malibu area for these high property values.

Analysis of Criterion #8:

While there are certainly areas of contrast between the two cities, because the attendance areas for the proposed districts are not changing from those currently in place, it is unlikely that property values will experience any significant changes as a result of the reorganization. Additionally, since school quality is relatively consistent across both attendance areas, concerns regarding this criterion are minimal.

Property values, both assessed value and market value, are high in both the Malibu and Santa Monica areas. Santa Monica is home to one of the priciest zip codes in the entire country and the second priciest zip code in Los Angeles County behind only Beverly Hills. Based on a report released by Forbes in March 2024, Santa Monica zip code 90402 ranks #8 nationally and #5 in California with a median sales price of \$4.058 million. Malibu, also a community comprised of high value homes, ranked #21 nationally and #16 in California with a median sales price of \$3.25 million. Post-reorganization, it is reasonable to expect that both communities will maintain their high property values due to their relative location as Southern California coastal communities. **Figure 54** shows the average home value in both communities over the past five years.

FIGURE 54



Source: Zillow, Home Values Index, October 2024.

The average residential assessed value in both Malibu and Santa Monica are also relatively high, with the average assessed value per parcel at \$2.7 million per parcel in Malibu and approximately \$2.1 million per parcel in Santa Monica. By comparison, the average assessed value per parcel in Los Angeles County is approximately \$848,000.

Ability to Meet Criterion #8:

With property values already high in both areas of the District, there is no evidence to suggest that property values would further increase as a result of the proposed reorganization. Further, there is no indication that the City of Malibu, as the petitioner, aims to increase property values through this proposal. Therefore, it is reasonable to expect that Criterion #8 will be substantially met.

CRITERION #9: SOUND FISCAL MANAGEMENT

Education Code Section 35753(a)(9):

The proposed reorganization will continue to promote sound fiscal management and not cause a substantial negative effect on the fiscal status of the proposed district or any existing district affected by the proposed reorganization.

Key Findings:

- SM-MUSD is currently Basic Aid, operating with \$193 million of Unrestricted General Fund revenues.
 - These revenue sources are comprised of over \$127.5 million of LCFF sources, mostly property taxes, plus almost \$62.6 million of Other Local Revenues. Almost all of the Other Local Revenues will be retained by SMUSD post-reorganization.
- The City of Malibu proposes a tax exchange to temporarily transfer a portion of MUSD's property taxes to SMUSD to provide per pupil funding commensurate with funding levels of SM-MUSD prior to separation.
- SM-MUSD has demonstrated an ability to educate students at current per pupil funding levels, realizing an Unrestricted General Fund surplus of approximately \$26 million in 2023-24.
 - This surplus is equal to 21% of SM-MUSD's Unrestricted General Fund Expenditures.
- With funding at almost \$32,000 per student for the proposed MUSD and over \$21,000 per student for the remaining SMUSD, both districts will be in the top 5 in per student funding of unified districts in all of Los Angeles County.
 - They will both be funded well above the average unified school district funding level in Los Angeles County of \$15,200 per student.
- Given the relatively high unrestricted funding levels, both districts can reasonably expect to be fiscally solvent post-reorganization.

Analysis of Criterion #9:

For 2023-24, SM-MUSD received \$193 million of Unrestricted General Fund revenues, as shown in **Figure 55**. These revenues are comprised of over \$127.5 million of LCFF Sources and \$62.6 million of Other Local Revenues, which is far in excess of what most school districts receive. The Other Local Revenues include:

- District-wide Parcel Tax
- Santa Monica Redevelopment Agency Pass-Through Tax

- City of Santa Monica Sales Tax
- City of Santa Monica Joint Use Tax
- City of Santa Monica Property Transfer Tax
- Other Leases and Rentals

These funding sources would need to be permanently allocated to the two reorganized districts. The only local tax that is generated partially in Malibu is the parcel tax. As it is a flat tax assigned to each parcel, it is relatively easy to calculate the revenue attributable to each jurisdiction. Based on the number of parcels in each new district, 70% of the parcel tax revenue would go to Santa Monica, and 30% would go to Malibu. It is understood that there is uncertainty related to whether the proposed MUSD would be able to continue receipt of the parcel tax post-reorganization. The City has investigated special legislation to enable the parcel tax to continue, otherwise the parcel tax could be reauthorized as part of the ballot measure related to this proposed reorganization. The parcel tax would continue for the remaining SMUSD post-reorganization.

Most of the other local revenues will accrue only to the remaining SMUSD. That would provide the remaining SMUSD with over \$50 million of Other Local Revenues beyond their LCFF entitlement, as shown in **Figure 55**.

FIGURE 55

2023-24 SM-MUSD General Fund Unaudited Actuals			
Revenues	Unrestricted	Restricted	Total
LCFF Sources	\$127,495,999	\$0	\$127,495,999
Federal Revenue	\$0	\$5,465,309	\$5,465,309
Other State Revenue	\$2,565,172	\$2,757,892	\$5,323,064
Other Local Revenue	\$62,693,793	\$14,359,882	\$77,053,675
Total Revenue	\$192,754,964	\$22,583,083	\$215,338,048
Expenditures	Unrestricted	Restricted	Total
Certificated Salaries	\$54,498,392	\$14,583,241	\$69,081,633
Classified Salaries	\$22,659,906	\$13,121,620	\$35,781,526
Employee Benefits	\$32,976,581	\$13,141,912	\$46,118,493
Books and Supplies	\$2,062,195	\$2,794,605	\$4,856,800
Services & Other Operating Costs	\$15,477,670	\$16,545,763	\$32,023,433
Capital Outlay	\$1,024,360	\$94,465	\$1,118,825
Other Outgo	(\$1,598,704)	\$4,524,813	\$2,926,109
Total Expenditures	\$127,100,400	\$64,806,419	\$191,906,818
Excess (Deficiency) of Revenues to Expenditures	\$65,654,565	(\$42,223,335)	\$23,431,229
Other Financing Sources/Uses	Unrestricted	Restricted	Total
Interfund Transfers	(\$2,600,000)	\$0	(\$2,600,000)
Other Sources	\$0	\$0	\$0
Contributions	(\$36,773,016)	\$36,773,016	\$0
Total Other Financing Sources	(\$39,373,016)	\$36,773,016	(\$2,600,000)
Net Increase (Decrease) in Fund Balance	\$26,281,548	(\$5,450,319)	\$20,831,229
Beginning Balance	\$30,327,915.6	\$21,605,917	\$51,933,833
Ending Fund Balance June 30, 2024	\$56,609,464	\$16,155,598	\$72,765,062

Source: Santa Monica-Malibu Unified School District 2023-24 Unaudited Actual Financial Statements.

SM-MUSD's 2024-25 Budget reflects a positive ending balance for the combined General Fund (restricted and unrestricted funds), although SM-MUSD is budgeting deficit spending, just as it has budgeted for at least the past decade. SM-MUSD's Adopted Budgets and Interim Reports demonstrate deficit spending, but in several cases the Unaudited Actuals do not reflect deficit spending but end with a surplus. Essentially, SM-MUSD budgets more expenditures than available revenues, but at the end of the year they may not have spent as much as they had budgeted, or they did not account for all of the revenues ultimately received. This is exemplified in the 2023-24 Unaudited Actuals shown above. The SM-MUSD budget projected deficit spending, but the Unaudited Actuals show a much different story with **a surplus of over \$26 million** in the Unrestricted General Fund.

When utilizing the SM-MUSD budget to project the future impact of this proposed reorganization, the existing pattern of deficit spending combined with the SM-MUSD budget practices should be considered so that there is a clear differentiation as to whether the proposed reorganization will cause a financial concern for SMUSD or whether existing circumstances lead to a concern with the future financial picture regardless of whether the proposed reorganization occurs. The Unaudited Actual Financial Statement provides a clearer picture of SM-MUSD's actual revenues, expenditures, and fund balance. Based on the 2023-24 Unaudited Actuals, SM-MUSD has a healthy unrestricted fund balance of \$56.6 million.

Property Tax Exchange

As permitted under Revenue and Taxation Code Section 99 and further described in the CDE Handbook, a property tax revenue exchange can be negotiated between the affected districts or can be determined by the county board of education, as shown in **Figure 56**. As stated in the CDE Handbook, this exchange of tax revenue could also be set forth in the petition to reorganize the district. The suggested property tax exchange included in this Feasibility Study would enable both MUSD and SMUSD to maintain fiscal solvency post-separation.

FIGURE 56

6. Property Tax Revenue

Section 99 of the *Revenue Taxation Code* provides for the reallocation of the property tax revenue when jurisdictional changes occur in the taxing agencies. Subdivision (b) of that section requires that the county assessor provide to the county auditor, within 30 days of receiving notification of the change of jurisdictions, a report that identifies the assessed valuations for the territory. The county auditor then estimates the amount of property tax revenue that is generated in the territory whose jurisdiction is changed. The auditor notifies the governing boards involved of the property tax revenue generated by the reorganized territory.

Subdivision (i) provides that, for any reorganization when one or more of the affected districts receives only basic aid apportionments, the affected governing boards shall negotiate the exchange in tax revenue between the districts, and, if they are unable to do so within 60 days after the effective date of the reorganization, the county board of education shall determine the amount of property tax revenue to be exchanged. If the affected districts are in more than one county, the State Board of Education decides the property tax revenue exchange.

In most cases, all of the tax revenue from the territory being reorganized would be transferred to the district receiving that territory. However, it is clear from Section 99 that the tax revenues to be transferred are subject to negotiation if one or more of the affected districts receives only basic aid apportionments. This exchange of tax revenue could also be set forth in the petition to reorganize districts.

Source: California Department of Education School District Organization Handbook, Chapter 9, Page 7-8.

In order to provide SMUSD with the same level of funding post-separation as received with the current SM-MUSD, property taxes from MUSD can be allocated to SMUSD based on the per pupil funding level both areas of the District receive in the year prior to separation. The per pupil funding level should account for the fact that students currently in Malibu area schools cost more to educate than students in Santa Monica area schools, due to low school and class sizes and higher transportation costs. Additionally, the per pupil funding level should be adjusted for the portion of the \$26 million surplus that is attributable to the Malibu portion of total SM-MUSD revenues.

The 2023-24 SM-MUSD Unaudited Actuals can be used to demonstrate the property tax exchange concept. As demonstrated in **Figure 57**, students in the SMUSD portion of SM-MUSD currently benefit from per pupil funding of just under \$21,000 per student after adjusting for the MUSD portion of the \$26 million surplus and the additional cost to educate Malibu area students. After separation, without the a tax exchange, SMUSD would receive per pupil funding of just over \$19,000 per student. By allocating per pupil funding of \$1,939, equivalent to \$14.7 million, from MUSD to SMUSD through a tax exchange, SMUSD will be able to operate with the same level of funding in the first year after separation, thus ensuring that all existing programs can be offered without jeopardizing the fiscal solvency of SMUSD. Since SM-MUSD has been able to operate with this level of funding AND generate a budgetary surplus of \$26 million in 2023-24, it is reasonable to expect that if SMUSD were to receive the same level of funding, they could also operate and maintain fiscal solvency post-separation.

FIGURE 57

Tax Exchange to Achieve Per Pupil Funding At Similar Level as Prior to Separation	
Unrestricted Funding of SMMUSD (from 2023-24 Unaudited Actuals)	\$192,754,964
Adjustment for Malibu Portion of Surplus	\$6,563,943
Adjusted Unrestricted Funding of SMMUSD	\$186,191,021
2023-24 Enrollment	8,629
Per Pupil Revenues	\$21,577
Adjustment for Higher Cost of Malibu Schools	\$600
Target Per Pupil Funding	\$20,977
Revenues to Be Retained by SMUSD	
LCFF Sources	\$84,709,617
SM Parcel Taxes	\$10,803,046
SM Sales Taxes	\$17,853,288
SM Joint Use Revenues	\$10,973,980
SM Property Transfer Tax Revenues	\$10,000,000
SM Foundation Revenues	\$1,800,000
Lease Revenues	\$2,457,091
Other Local Revenues	\$3,759,115
Other State Revenues	\$2,257,351
Total Revenues to be Retained by SMUSD	\$144,613,488
SMUSD 2023-24 Enrollment	7,596
Actual Per Pupil Funding	\$19,038
Additional Per Pupil Funding Required	\$1,939
Tax Exchange Required to Achieve Target Per Pupil Funding	\$14,730,523

Based on this exchange of property taxes, both SMUSD and MUSD will be able to continue to promote sound fiscal management, and this proposed reorganization will not cause a substantial negative effect on the fiscal status of either SMUSD or MUSD. On an ongoing basis, MUSD could slightly reduce its tax exchange amount to ease SMUSD into operating on its own without the benefit of property taxes generated in within MUSD's boundaries.

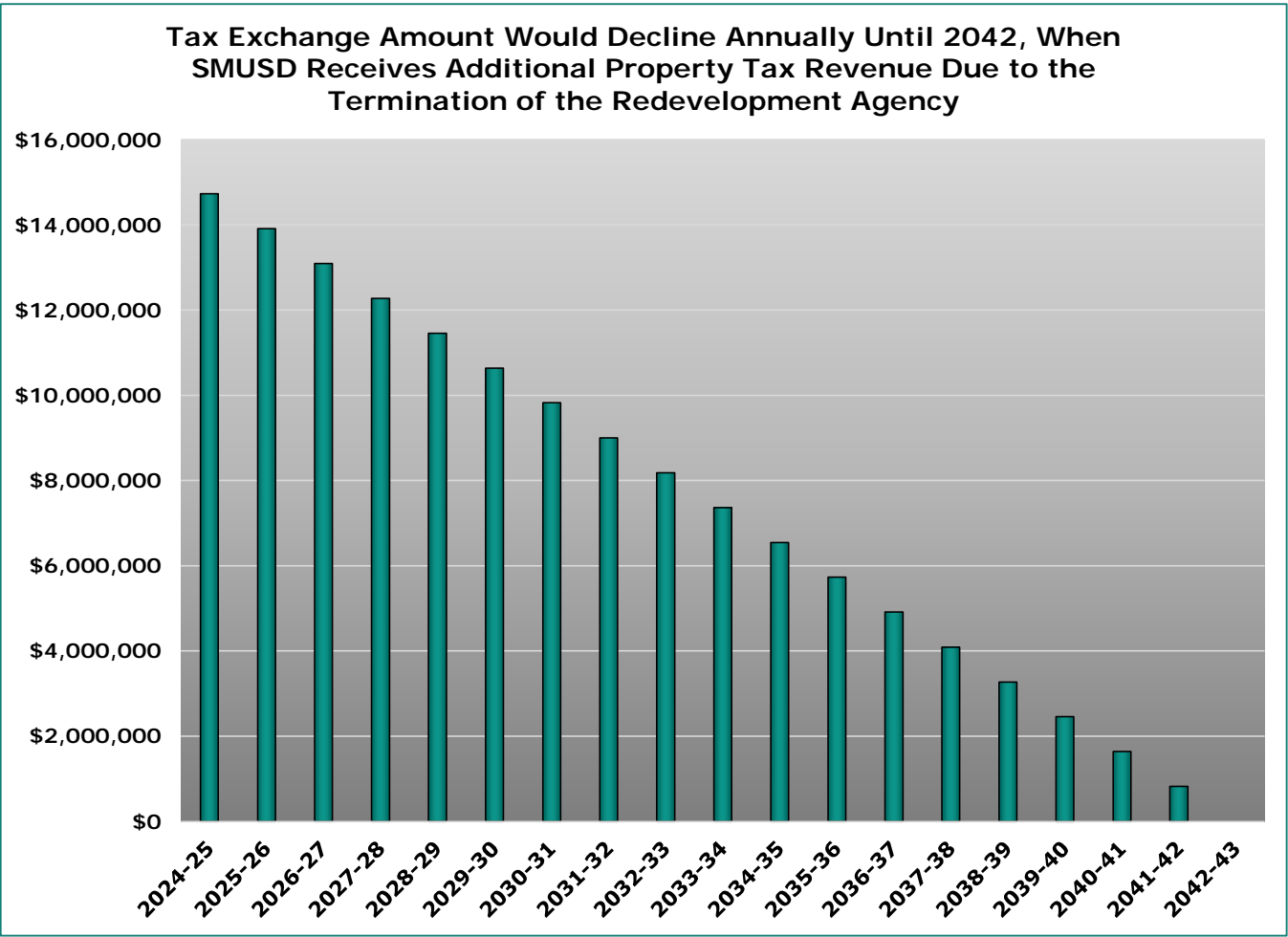
It is important to note that in 2042 the redevelopment agencies within Santa Monica will terminate. Currently, property tax revenue from Santa Monica is being diverted to pay the existing debts and obligations of the Santa Monica redevelopment agency. Beginning in 2042, those tax revenues currently diverted to the redevelopment agency will return to all other overlapping taxing agencies, including SMUSD. Therefore, the City of Malibu proposes that the property tax exchange between MUSD and SMUSD terminates in 2042, when SMUSD will see an increase in local property taxes.

In the meantime, from the time of separation until 2042, MUSD can annually reduce its property tax exchange amount on a straight line basis, gradually reducing the amount of tax revenue allocated

from MUSD to SMUSD. This will prevent any significant one-time reductions in revenue for SMUSD and will enable them to incrementally adjust to operating on revenues generated from their own tax base, combined with their substantial receipts from Other Local Sources, currently in excess of \$50 million per year.

As shown in **Figure 58**, demonstrates how the tax exchange from MUSD to SMUSD would taper off from the time of separation until 2042, on a straight-line basis. This would total an estimated \$130 million transferred from MUSD to SMUSD through 2042, based on the 2023-24 figures. Note: The chart assumes 2023-24 as the initial year of the calculation to demonstrate the concept. However, the actual exchange would be calculated based on the Unaudited Actuals figures in the year prior to separation, whenever that occurs, and continue until 2042.

FIGURE 58



Financial Viability of the Reorganized Districts

The financial viability of the proposed MUSD and remaining SMUSD would be largely dependent upon management decisions. However, estimates of available funding for each district can be used as a guide for whether the future revenue stream of the separate districts will be sufficient to reasonably

fund ongoing operations. The ultimate fiscal solvency, of course, is dependent on the spending decisions of the proposed MUSD and remaining SMUSD boards.

The assumptions utilized to develop these budgets are described below **Figures 59 and 60**.

Figure 59 provides an overview of the anticipated budget for the proposed MUSD. Of course, the decisions made by the future board will impact the actual budget of the proposed district.

FIGURE 59

Malibu Unified School District Pro Forma Budget for 2025-26				
	Unrestricted 2025-26 (B)	Restricted 2025-26	Combined	Notes
LCFF Revenue	\$42,786,382	\$0	\$42,786,382	(A)
Federal Revenue	\$0	\$928,780	\$928,780	(C)
State Revenue	\$257,604	\$379,814	\$637,418	(C)
Parcel Tax	\$4,162,525	\$0	\$4,162,525	(D)
Other Local Revenue	\$514,630	\$1,784,781	\$2,299,411	(G)
Total Revenue	\$47,721,141	\$3,093,375	\$50,814,516	
Certificated	\$9,252,017	\$2,859,925	\$12,111,942	(E)
Classified	\$4,540,584	\$2,539,255	\$7,079,839	(E)
Benefits	\$7,793,774	\$2,149,066	\$9,942,840	(E)
Books & Supplies	\$1,158,608	\$226,350	\$1,384,958	(E)
Professional Services	\$2,149,399	\$1,627,624	\$3,777,023	(E)
Capital Outlay	\$395,000	\$13,151	\$408,151	(E)
Indirect/Direct Costs	(\$112,443)	\$112,443	\$0	(E)
Total Expenditures	\$25,176,939	\$9,527,814	\$34,704,753	
Transfer Property Taxes to SMUSD	(\$14,730,523)	\$0	(\$14,730,523)	
Contribution	(\$6,434,439)	\$6,434,439	\$0	(F)
Surplus/(Deficit)	\$1,379,240	\$0	\$1,379,240	
Beginning Fund Balance	\$11,140,419	\$0	\$11,140,419	(H)
Ending Fund Balance	\$12,519,659	\$0	\$12,519,659	

The budget for MUSD was built on the following assumptions, as referenced in the "Notes" column in **Figure 59**:

- (A) LCFF Revenue is calculated uniquely for MUSD as shown in the analysis for Criterion #5 in this Report. As a Basic Aid district, these LCFF Revenues exceed the calculated LCFF entitlement, thus making the proposed MUSD property tax funded.
- (B) Built zero-based budget totaling \$5 million more than an allocated, per-student basis of current SM-MUSD budget would generate. Only the per-student and site-specific Malibu

"share" of budget was reduced from the SM-MUSD budget in preparing a pro forma SMUSD budget, allowing the new MUSD to add resources beyond those currently spent on that portion of the district.

- (C) Allocated current SM-MUSD 2024-25 Restricted Budget on a per-student basis, assuming MUSD enrollment of 12%. Removed one-time carryover amounts.
- (D) Applied only the portion of the SM-MUSD parcel tax generated by property within the proposed MUSD's boundaries. In order to retain this parcel tax revenue, special legislation may be required.
- (E) Unrestricted budget was developed on a department basis for district office and operations functions, and site budgets for school sites to be transferred to the proposed MUSD based on the SM-MUSD 2024-25 Adopted Budget. Restricted budgets are based on a pro rata share of the current SM-MUSD 2024-25 budget, adjusted for increased staffing for the proposed MUSD to cover central office and SELPA functions.
- (F) Contribution amount reflects the contribution needed to balance restricted spending versus restricted revenues.
- (G) Based on the schedule of Other Local Revenues received by SM-MUSD, excluding property taxes subject to the LCFF calculation.
- (H) Beginning fund balance amount will be calculated at 25% of prior year SM-MUSD fund balance to Malibu, using the 2023-24 ending balance of \$56,609,464 less - projected deficit spending of \$12,047,790 in 2024-25.

The proposed MUSD budget model utilized certificated and classified salary and benefit costs that were established based on the school site budgets for the four schools identified to be transferred to the proposed MUSD in the reorganization petition.

It is anticipated that MUSD would be entitled to approximately 25% of the SM-MUSD fund balance, based on the MUSD share of unrestricted revenues of SM-MUSD. This fund balance allocation has been reflected in the budgets of both SMUSD and MUSD as well as the multi-year budget projections provided later in this report.

Figure 60 provides an overview of the anticipated budget for the remaining SMUSD. This budget assumes that the District will make cuts as required and will appropriately scale down administrative overhead based on the reduction of 1,033 students that will move to the new MUSD combined with the declining enrollment in the Santa Monica area of the District. Additionally, the expenses of the remaining SMUSD reflect the actual school site budgets of the schools in Santa Monica, specifically deducting out the school site costs of Malibu area schools. This accounts for the fact that Malibu area schools are currently more expensive to operate than Santa Monica schools due to their relatively small student population and remote location.

FIGURE 60

Santa Monica Unified School District Pro Forma Budget for 2025-26				
	Unrestricted 2025-26 (B)	Restricted 2025-26 (I)	Combined	Notes
LCFF Revenue	\$100,414,416	\$0	\$100,414,416	(A)
Federal Revenue	\$0	\$6,939,589	\$6,939,589	(C)
State Revenue	\$2,259,198	\$14,932,458	\$17,191,656	(C)
Parcel Tax	\$11,254,235	\$0	\$11,254,235	(D)
Other Local Revenue	\$48,144,382	\$13,335,399	\$61,479,781	(G)
Total Revenue	\$162,072,231	\$35,207,446	\$197,279,677	
Certificated	\$52,094,843	\$17,817,028	\$69,911,871	(E)
Classified	\$24,174,696	\$16,335,752	\$40,510,448	(E)
Benefits	\$36,654,122	\$15,873,992	\$52,528,114	(E)
Books & Supplies	\$2,640,000	\$1,691,226	\$4,331,226	(E)
Professional Services	\$16,086,388	\$21,386,498	\$37,472,886	(E)
Capital Outlay	\$88,000	\$98,262	\$186,262	(E)
Indirect/Direct Costs	(\$1,936,400)	\$840,140	(\$1,096,260)	(E)
Total Expenditures	\$129,801,649	\$74,042,898	\$203,844,547	
Malibu Property Tax Transfer	\$14,730,523	\$0	\$14,730,523	
Transfers In/ (Out)	(\$2,455,200)	\$0	(\$2,455,200)	
Contribution	(\$38,835,452)	\$38,835,452	\$0	(F)
Surplus/(Deficit)	\$5,710,453	\$0	\$5,710,453	
Beginning Fund Balance	\$33,421,256	\$0	\$33,421,256	(H)
Ending Fund Balance	\$39,131,708	\$0	\$39,131,708	

The budget for SMUSD was built on the following assumptions, as referenced in the “Notes” column in **Figure 60**:

- (A) LCFF Revenue recalculated, with Minimum State Aid allocated per student. Annual increase in property taxes is estimated per separate schedule.
- (B) Budget modeled from SM-MUSD 2024-25 Adopted Budget and MYP, reflects anticipated budget cuts and removal of Malibu revenues and expenditures beginning in 2025-26.
- (C) Allocated current SM-MUSD 2024-25 Restricted Budget on a per-student basis, assuming SMUSD enrollment of 88%. Removed one-time carryover amounts.
- (D) Portion of SM-MUSD parcel tax generated by property within the new SMUSD district boundaries (Estimated based on District input).
- (E) Budget reflects salary increases of 13% certificated as of 2025-26, 18% classified salary increase as of 2025-26, on-going 2% certificated salary increase annually, and annual salary increases of 1.6% for step movement on the salary schedule.

- (F) Contribution amount reflects the contribution needed to balance restricted spending versus restricted revenues.
- (G) Based on the schedule of Other Local Revenues received by SM-MUSD, excluding property taxes subject to the LCFF calculation.
- (H) Beginning fund balance amount will be calculated at 75% of prior year SM-MUSD fund balance to Malibu, using the 2023-24 ending balance of \$56,609,464 less SM-MUSD's projected deficit spending of \$12,047,790 in 2024-25.
- (I) Allocated current SM-MUSD 2023-24 Restricted Budget on a per-student basis, assuming SMUSD enrollment of 88%. Removed one-time carryover amounts.

As demonstrated by the estimated budget for the remaining SMUSD, if the reasonable cuts are applied and the appropriate expenditures are allocated to MUSD, then the remaining SMUSD will be able to maintain fiscal solvency post-reorganization. Of course, this is highly dependent on the management decisions of SMUSD and their ability to make the appropriate staffing cuts to reflect the reduction of 1,033 students to Malibu and their own declining enrollment. Presumably, given the time it would take for the reorganization to be implemented, SMUSD would have appropriate time to make such adjustments. The substantial reserves that SM-MUSD has accumulated will provide SMUSD with some time to make any required budget cuts.

As previously stated, the projected budget for SMUSD deducts the more expensive per student costs for Malibu schools as compared to Santa Monica area schools. This concept was acknowledged in November 2020 when SM-MUSD prepared a Frequently Asked Questions page related to this proposed reorganization. On page 2 of that document, SM-MUSD quantified the per student cost to educate students in Malibu to be \$9,856 per student as compared to \$7,606 per student in Santa Monica, as shown in **Figure 61**.

FIGURE 61

5. Where does funding for the SMMUSD currently come from and how have Malibu students benefitted from the current funding model?

The students and communities of Santa Monica and Malibu enjoy a unique and diverse portfolio of general fund revenues -- many of which originate exclusively from the Santa Monica community -- as detailed below. These revenues support both communities, with per pupil expenditures in Malibu exceeding the per pupil expenditures in Santa Monica. The per pupil expenditures in terms of human resources, transportation, materials, and programs are currently: \$9,856 per student in Malibu and \$7,606 per student in Santa Monica. The most visible reflection of the difference in expenditures between the two communities is in the class size average/teacher ratio:

- 18 students per teacher in Malibu elementary schools*
- 22 students per teacher in the Santa Monica elementary schools*
- 23 students per teacher in the Malibu secondary schools*
- 27 students per teacher in the Santa Monica secondary schools*

Although the exact cost differential between schools in the two areas is higher in the current fiscal year, **Figure 61** demonstrates SM-MUSD's understanding and acknowledgment of the fact that Malibu area schools are more expensive to operate than Santa Monica area schools and the projected SMUSD budget should reflect this fact.

Multi-Year Budget Projections. As shown in **Figure 62**, the proposed MUSD is able to operate with a budgetary surplus, accounting for the property tax exchange with SMUSD. Over time, MUSD will be able to add educational programs, as desired by the Malibu community, as operating surpluses are projected.

FIGURE 62

Malibu Unified School District Multi-Year Budget Projection								
	Notes	Annual Adj (K)	Unrestricted 2025-26 (Year 1)	Restricted 2025-26	Combined 2025-26 (Year 1)	Unrestricted 2026-27	Restricted 2026-27	Combined 2026-27
LCFF Revenue	(A)	various	\$42,786,382	\$0	\$42,786,382	\$42,610,532	\$0	\$42,610,532
Federal Revenue		flat	\$0	\$928,780	\$928,780	\$0	\$928,780	\$928,780
State Revenue		flat	\$257,604	\$379,814	\$637,418	\$257,604	\$379,814	\$637,418
Parcel Tax	(D)	2.5%	\$4,162,525	\$0	\$4,162,525	\$4,266,588	\$0	\$4,266,588
Other Local Revenue	(G)	various	\$514,630	\$1,784,781	\$2,299,411	\$518,932	\$1,784,781	\$2,303,713
Total Revenue			\$47,721,141	\$3,093,375	\$50,814,516	\$47,653,656	\$3,093,375	\$50,747,031
Certificated	(E) (L)	3.6%	\$9,252,017	\$2,859,925	\$12,111,942	\$9,585,090	\$2,962,882	\$12,547,972
Classified	(E) (L)	1.6%	\$4,540,584	\$2,539,255	\$7,079,839	\$4,613,233	\$2,579,883	\$7,193,116
Benefits	(E) (J)	4.2%	\$7,793,774	\$2,149,066	\$9,942,840	\$8,228,870	\$2,279,645	\$10,508,515
Books & Supplies	(E)	3.0%	\$1,158,608	\$226,350	\$1,384,958	\$1,193,366	\$226,350	\$1,419,716
Professional Services	(E)	4.0%	\$2,149,399	\$1,627,624	\$3,777,023	\$2,235,375	\$1,627,624	\$3,862,999
Capital Outlay	(E)	0.0%	\$395,000	\$13,151	\$408,151	\$395,000	\$13,151	\$408,151
Indirect/Direct Costs	(E)	\$0	(\$112,443)	\$112,443	\$0	(\$112,443)	\$112,443	\$0
Total Expenditures			\$25,176,939	\$9,527,814	\$34,704,753	\$26,138,491	\$9,801,978	\$35,940,469
Transfer Property Taxes to SMUSD	(H)		(\$14,730,523)	\$0	(\$14,730,523)	(\$13,864,021)	\$0	(\$13,864,021)
Contribution	(F)	3.0%	(\$6,434,439)	\$6,434,439	\$0	(\$6,708,603)	\$6,708,603	\$0
Surplus/(Deficit)			\$1,379,240	\$0	\$1,379,240	\$942,541	\$0	\$942,541
Beginning Fund Balance	(I)		\$11,140,419	\$0	\$11,140,419	\$12,519,659	\$0	\$12,519,659
Ending Fund Balance			\$12,519,659	\$0	\$12,519,659	\$13,462,199	\$0	\$13,462,199

	Notes	Annual Adj (K)	Unrestricted 2027-28	Unrestricted 202-29	Unrestricted 2029-30	Unrestricted 2030-31
LCFF Revenue	(A)	various	\$44,834,802	\$47,179,662	\$49,647,158	\$52,248,669
Federal Revenue		flat	\$0	\$0	\$0	\$0
State Revenue		flat	\$257,604	\$257,604	\$257,604	\$257,604
Parcel Tax	(D)	2.5%	\$4,373,253	\$4,482,584	\$4,594,648	\$4,709,515
Other Local Revenue	(G)	various	\$523,319	\$527,795	\$532,360	\$537,016
Total Revenue			\$49,988,978	\$52,447,645	\$55,031,770	\$57,752,804
Certificated	(E) (L)	3.6%	\$9,930,153	\$10,287,639	\$10,657,994	\$11,041,681
Classified	(E) (L)	1.6%	\$4,687,045	\$4,762,037	\$4,838,230	\$4,915,642
Benefits	(E) (J)	4.2%	\$8,685,505	\$9,164,691	\$9,667,484	\$10,069,651
Books & Supplies	(E)	3.0%	\$1,229,167	\$1,266,042	\$1,304,023	\$1,343,144
Professional Services	(E)	4.0%	\$2,324,790	\$2,417,781	\$2,514,492	\$2,615,072
Capital Outlay	(E)	0.0%	\$395,000	\$395,000	\$395,000	\$395,000
Indirect/Direct Costs	(E)	\$0	(\$112,443)	(\$112,443)	(\$112,443)	(\$112,443)
Total Expenditures			\$27,139,217	\$28,180,747	\$29,264,780	\$30,267,747
Transfer Property Taxes to SMUSD	(H)		(\$12,997,520)	(\$12,131,019)	(\$11,264,517)	(\$10,398,016)
Contribution	(F)	3.0%	(\$6,993,732)	(\$7,290,277)	(\$7,598,715)	(\$7,826,676)
Surplus/(Deficit)			\$2,858,509	\$4,845,602	\$6,903,758	\$9,260,365
Beginning Fund Balance	(I)		\$13,462,199	\$16,320,708	\$21,166,310	\$28,070,068
Ending Fund Balance			\$16,320,708	\$21,166,310	\$28,070,068	\$37,330,433

As shown in **Figure 63**, the remaining SMUSD will also be able to operate with a surplus, accounting for the declining property tax exchange from MUSD. Further, it is projected that SMUSD will be able to build up substantial reserve levels from the combination of the funding from MUSD property tax exchange, combined with their own growing tax base and substantial funding from Other Local Revenues.

FIGURE 63

Santa Monica Unified School District Multi-Year Budget Projection								
	Notes	Annual Adj (K)	Unrestricted 2025-26 (Year 1)	Restricted 2025-26	Combined 2025-26 (Year 1)	Unrestricted 2026-27	Restricted 2026-27	Combined 2026-27
LCFF Revenue	(A)	various	\$100,414,416	\$0	\$100,414,416	\$105,605,841	\$0	\$105,605,841
Federal Revenue		flat	\$0	\$6,939,589	\$6,939,589	\$0	\$6,939,589	\$6,939,589
State Revenue		flat	\$2,259,198	\$14,932,458	\$17,191,656	\$2,259,198	\$14,932,458	\$17,191,656
Parcel Tax	(D)	2.5%	\$11,254,235	\$0	\$11,254,235	\$11,535,591	\$0	\$11,535,591
Other Local Revenue	(G)	various	\$48,144,382	\$13,335,399	\$61,479,781	\$48,850,998	\$13,335,399	\$62,186,398
Total Revenue			\$162,072,231	\$35,207,447	\$197,279,677	\$168,251,628	\$35,207,447	\$203,459,075
Certificated	(E) (L)	3.6%	\$52,094,843	\$17,817,028	\$69,911,871	\$51,527,824	\$18,458,441	\$69,986,265
Classified	(E) (L)	1.6%	\$24,174,696	\$16,335,752	\$40,510,448	\$24,601,764	\$16,597,124	\$41,198,888
Benefits	(E) (J)	4.2%	\$36,654,122	\$15,873,992	\$52,528,113	\$37,470,794	\$16,794,024	\$54,264,818
Books & Supplies	(E)	3.0%	\$2,640,000	\$1,691,226	\$4,331,226	\$1,640,000	\$1,691,226	\$3,331,226
Professional Services	(E)	4.0%	\$16,086,388	\$21,386,498	\$37,472,885	\$15,570,239	\$21,386,498	\$36,956,736
Capital Outlay	(E)	0.0%	\$88,000	\$98,262	\$186,262	\$88,000	\$98,262	\$186,262
Indirect/Direct Costs	(E)	\$0	(\$1,936,400)	\$840,140	(\$1,096,260)	(\$2,081,806)	\$840,140	(\$1,241,666)
Total Expenditures			\$129,801,648	\$74,042,897	\$203,844,545	\$128,816,814	\$75,865,715	\$204,682,529
Transfer Property Taxes to SMUSD	(H)		\$14,730,523	\$0	\$14,730,523	\$13,864,021	\$0	\$13,864,021
Transfers Out/Other Sources			(\$2,455,200)	\$0	(\$2,455,200)	(\$2,455,200)	\$0	(\$2,455,200)
Contribution	(F)	3.0%	(\$38,835,450)	\$38,835,450	\$0	(\$40,658,268)	\$40,658,268	\$0
Surplus/(Deficit)			\$5,710,456	\$0	\$5,710,455	\$10,185,368	\$0	\$10,185,367
Beginning Fund Balance	(I)		\$33,421,256	\$0	\$33,421,256	\$39,131,711	\$0	\$39,131,711
Ending Fund Balance			\$39,131,711	\$0	\$39,131,711	\$49,317,079	\$0	\$49,317,078

	Notes	Annual Adj (K)	Unrestricted 2027-28	Unrestricted 202-29	Unrestricted 2029-30	Unrestricted 2030-31
LCFF Revenue	(A)	various	\$111,107,905	\$116,941,070	\$123,127,253	\$129,689,935
Federal Revenue		flat	\$0	\$0		
State Revenue		flat	\$1,920,475	\$2,259,198	\$257,604	\$257,606
Parcel Tax	(D)	2.5%	\$11,823,981	\$12,119,580	\$12,422,570	\$12,733,134
Other Local Revenue	(G)	various	\$49,570,341	\$50,302,627	\$51,048,082	\$51,806,931
Total Revenue			\$174,422,702	\$181,622,476	\$186,855,509	\$194,487,606
Certificated	(E) (L)	3.6%	\$53,382,825	\$55,304,607	\$57,295,573	\$59,358,214
Classified	(E) (L)	1.6%	\$24,995,392	\$25,395,318	\$25,801,643	\$26,214,469
Benefits	(E) (J)	4.2%	\$39,642,908	\$41,292,053	\$43,009,802	\$44,799,010
Books & Supplies	(E)	3.0%	\$1,689,200	\$1,739,876	\$1,792,072	\$1,845,834
Professional Services	(E)	4.0%	\$16,193,048	\$16,840,770	\$17,514,401	\$18,214,977
Capital Outlay	(E)	0.0%	\$88,000	\$88,000	\$88,000	\$88,000
Indirect/Direct Costs	(E)	\$0	(\$840,140)	(\$840,140)	(\$840,140)	(\$840,140)
Total Expenditures			\$135,151,234	\$139,820,485	\$144,661,352	\$149,680,365
Transfer Property Taxes to SMUSD	(H)		\$12,997,520	\$12,131,019	\$11,264,517	\$10,398,016
Transfers Out/Other Sources			(\$2,455,200)	(\$2,455,200)	(\$2,455,200)	(\$2,455,200)
Contribution	(F)	3.0%	(\$42,553,993)	(\$43,830,613)	(\$45,145,532)	(\$46,499,897)
Surplus/(Deficit)			\$7,259,795	\$7,647,197	\$5,857,942	\$6,250,160
Beginning Fund Balance	(I)		\$49,317,078	\$56,576,873	\$64,224,070	\$70,082,012
Ending Fund Balance			\$56,576,873	\$64,224,070	\$70,082,012	\$76,332,172

Since the actual expenditure reductions are in the hands of the SMUSD school board, the revenue per student can be evaluated to make a reasonable assumption as to whether there would be sufficient funding for the operations of SMUSD. ***With unrestricted General Fund revenues of over \$21,000 per student, SMUSD would rank in the top 5 districts in all of Los Angeles County in terms of unrestricted funding per student,*** based on the 2022-23 *Los Angeles County Schools Financial Report* published by the Los Angeles County Office of Education, as shown in **Figure 64**.

FIGURE 64

Per Pupil Funding LA County Unified Districts 2022-23				
Rank	District	Revenues	ADA	Per Pupil Funding
1	Beverly Hills	\$82,911,215	2,940	\$28,201
2	Santa Monica-Malibu	\$175,084,918	8,232	\$21,269
3	Inglewood	\$119,646,349	5,711	\$20,950
4	Los Angeles	\$6,858,814,771	347,715	\$19,725
5	Compton	\$296,870,387	15,907	\$18,663
6	Bassett	\$47,693,900	2,630	\$18,135
7	Paramount	\$211,107,152	11,752	\$17,964
8	Baldwin Park	\$170,479,867	9,599	\$17,760
9	Montebello	\$329,609,495	18,659	\$17,665
10	Azusa	\$106,712,688	6,042	\$17,662

The \$21,000 per student funding of SMUSD is over \$10,000 per student above the average unified district funding level in Los Angeles County of \$15,288 per student. With projected declining enrollment combined with anticipated growth in the SMUSD property tax base, this per student funding number will increase in subsequent budget years. Given the high level of per student funding, it is reasonable to conclude that the remaining SMUSD will have sufficient funding to operate, and the proposed reorganization will not jeopardize the fiscal solvency of the district.

Likewise, the new MUSD will have unrestricted General Fund revenues of almost \$32,000 per student, after the property tax transfer to SMUSD. The MUSD budget demonstrates that MUSD will be able to operate programs at the same level as with SM-MUSD in the short term, but it is expected with ongoing property tax base growth, MUSD will have more budget flexibility in the future that will provide students with enhanced learning opportunities. Nonetheless, based on expected funding, MUSD will have sufficient funding to operate, and the proposed reorganization will not jeopardize the fiscal solvency of the district.

Ability to Meet Criterion #9:

Post-reorganization, both school districts are projected to remain Basic Aid districts and will be in the top 5 in Los Angeles County in per student unrestricted revenues. Preliminary initial budgets for each school district demonstrate financial viability post-reorganization. With the proposed property tax exchange, students from both districts will achieve per pupil funding at a level similar to the level that SM-MUSD currently operates with. Since SM-MUSD was able to achieve a \$26 million surplus with the current level of funding, it is reasonable to expect that it can sustain operations with a similar level of future funding and that both districts will maintain fiscal solvency post-reorganization. Therefore, it is reasonable to conclude that Criterion #9 will be substantially met.

**FEASIBILITY STUDY TO
THE LOS ANGELES COUNTY COMMITTEE
ON SCHOOL DISTRICT ORGANIZATION
CONCERNING A PROPOSAL TO FORM
THE MALIBU UNIFIED SCHOOL DISTRICT
FROM TERRITORY IN THE
SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT**

APRIL 2, 2025

Prepared by:

**Los Angeles County Office of Education
Division of Business Advisory Services**

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I. EXECUTIVE SUMMARY

This feasibility study to the Los Angeles County Committee on School District Organization (County Committee) is provided in support of their responsibility to examine the proposal to form a Malibu Unified School District (USD) from territory currently within the Santa Monica-Malibu USD (SMMUSD).

Following a preliminary review under EC 35721, which included public hearings and an examination of the issues, the County Committee voted to bring this proposal into the regular review process under EC 35753. That process included three public hearings held within the impacted territory, and the development of this feasibility study. This study will be presented to the County Committee at its regular meeting on April 2, 2025, at which time the expectation is that the County Committee will approve or deny the petition. Because unifications are state actions, the County Committee's decision on this petition is advisory only. If the County Committee approves the petition, it must still go before the State Board of Education (SBE) for final resolution under EC 35722. If the County Committee denies the petition, and either of the parties appeal that decision, it will also go before the SBE for final resolution.

Under EC 35753, the County Committee must review the submitted petition for unification by examining the so-called Nine Conditions described therein. In order to facilitate dialogue and provide information that is available at this time in support of the examination of this petition, this feasibility study incorporates a discussion of the Nine Conditions as an analytical framework, including recommendations by staff as to whether each Condition is substantially met. The feasibility study is further supported by a fiscal analysis performed by School Services of California (SSC) (Appendix A).

Staff Recommendation

Staff and County Committee members have reviewed a significant amount of information related to this petition, in the form of submitted material, presentations at hearings and meetings, and oral testimony from the impacted parties and hundreds of members of the public, over the course of nearly nine years. Taking that information into consideration, and based on the fiscal analysis provided by School Services of California and other information discussed herein, staff has found that eight of the Nine Conditions are not substantially met, based on information we have available at this stage. Those conditions are 1, 2, 3, 4, 5, 6, 7 and 9.

Further, the fiscal analysis conducted by SSC had concerns about several conditions (3, 5, and 7) and found that an examination of Condition 9 indicates that the creation of a Malibu USD would have a significant negative fiscal impact on the SMMUSD(which would become the Santa Monica USD following any such reorganization).

Staff recommends that the County Committee deny this proposal under EC 35753.Should the County Committee vote to deny this petition, it may be appealed to the SBE by the impacted parties. Should the County Committee vote to approve this petition, it will still need to be submitted for review by the SBE, since unification is a state action.

TABLE 1
SUMMARY OF CONDITIONS, FINDINGS, AND RATIONALE

#	Condition	Finding	Rationale
1.	Adequacy in number of students.	Not Substantially Met	The resulting Malibu USD would not have, nor may not be able to maintain, enrollment of at least 1,501 students.
2.	Community identity.	Not Substantially Met	Because the area proposed for a Malibu USD has been a part of the Santa Monica-Malibu USD for 70+ years, and has sent students to Santa Monica area schools for more than 100 years, they have longstanding inclusion in Santa Monica-Malibu USD while maintaining area identity. The Malibu area does not need to separate from the SMMUSD to sustain this.
3.	Equitable division of assets and liabilities.	Not Substantially Met	Reorganization would require a division of assets and liabilities; while it is not possible to determine the detailed financial impact at this time, significant questions have been raised about the financial solvency of the SMMUSD, new Malibu USD and resulting SMUSD going forward should the unification be granted.
4.	Will not promote ethnic discrimination or segregation.	Not Substantially Met	Reorganization would affect student enrollment or attendance significantly in both a new Malibu USD and what would result as the Santa Monica USD, to a degree that there would likely be dramatic shifts in racial/ethnic demographics of enrolled students.
5.	Will not substantially increase costs to the state.	Not Substantially Met	Reorganization is likely to impact state funding significantly in terms of current and potential new buildings and other fiscal obligations.
6.	Will not significantly disrupt educational programs in either district.	Not Substantially Met	Given the significantly smaller enrollment of the proposed Malibu USD, it is not clear whether the new district can field an equivalent educational program.

#	Condition	Finding	Rationale
7.	Will not result in a significant increase in school housing costs.	Not Substantially Met	Reorganization would likely impact school housing costs substantially in terms of new school and administrative facilities needed, as well as potential remediation of existing facilities for a Malibu USD.
8.	Proposal is not primarily designed to substantially increase property values.	Substantially Met	While property values may increase in Malibu as a result of the creation of a Malibu USD, there is no evidence that a desire to increase property values is the <i>primary</i> motive for the reorganization request.
9.	Will not affect the fiscal management or status of the affected districts.	Not Substantially Met	Reorganization is likely to lead to a significant impact to the fiscal management of both a new Malibu USD and the resulting Santa Monica USD. While the SMMUSD is currently a basic aid district, it is not clear that this status could be maintained in light of a loss of enrollment, parcel tax revenues and loss of the ability to include high-value properties in its assessed valuation, among other fiscal challenges.

II. INTRODUCTION AND BACKGROUND

On September 1, 2017, the Los Angeles County Office of Education (LACOE) received a proposal 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 proposal was introduced at the November 1, 2017 regular County Committee meeting, and at least one public hearing was to be scheduled. Under EC 35721, a preliminary public hearing was required because the petitioner submitting the proposal was a city. For purposes of this feasibility study, the terms ‘proposal’ and ‘petition’ will be used interchangeably. The term ‘petitioners’ will refer to the City of Malibu, as the proponents of the proposal. Further, the terms ‘remaining Santa Monica USD’ and ‘Resulting Santa Monica USD’ both refer to any entity remaining after a Malibu USD may be formed. Should a reorganization be approved, the Santa Monica USD would be an augmentation of the current Santa Monica-Malibu USD, with altered district borders and a different name, but would still be the original district that was once referred to as the SMMUSD.

After this local agency proposal was introduced, 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 proposal. On February 28, 2018, however, the City of Malibu apprised the County Committee of their interest in pursuing the preliminary public hearing and moving the petition forward to its required preliminary review.

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 receiving an update from the City and the District 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; they did so again at the March 6, 2019 meeting.

On May 10, 2019, staff met with the SMMUSD to ascertain the status of its ongoing study and analyses of the petition. The parties to the proposal returned to the County Committee on September 4, 2019, October 2, 2019, November 6, 2019, January 8, 2020, and March 4, 2020 to provide updates on their studies, and on August 5, 2020, the SMMUSD’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 special legislation, including the potential splitting of a current parcel tax in the SMMUSD had also stalled; this legislation was once discussed as a critical component of any Malibu USD. On October 12, 2020, the City of Malibu said it would hire a third-party consultant to provide a new fiscal review on the proposal. On October 29, 2020, the Malibu city manager sent the city council’s request that the proposal 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. The intent was articulated by the County Committee that staff present findings as well, so the preliminary public hearing was split into two parts to allow staff adequate time to conduct an analysis.

The initial part of the preliminary public hearing was held virtually on April 17, 2021 and was attended by more than 300 people. The County Committee heard testimony from the City of Malibu, the SMMUSD, and both proponents and opponents of the proposal from the public. Subsequently, the County Committee set the conclusion of the preliminary public hearing for September 18, 2021 and held that hearing virtually as well in which the County Committee received comments from members of the Malibu City Council and its representatives; the SMMUSD and its representatives; stakeholder groups within the City of Santa Monica; and, individuals and residents from both communities. Under EC 35721, the staff presented a preliminary feasibility study, finding that eight of the Nine Conditions may not be substantially met. However, staff recommended that the petition be moved into the formal review process under EC 35753. The County Committee agreed with that recommendation at its special meeting held after that public hearing on September 18, 2021, voting to move the petition to the regular review process under EC 35753.

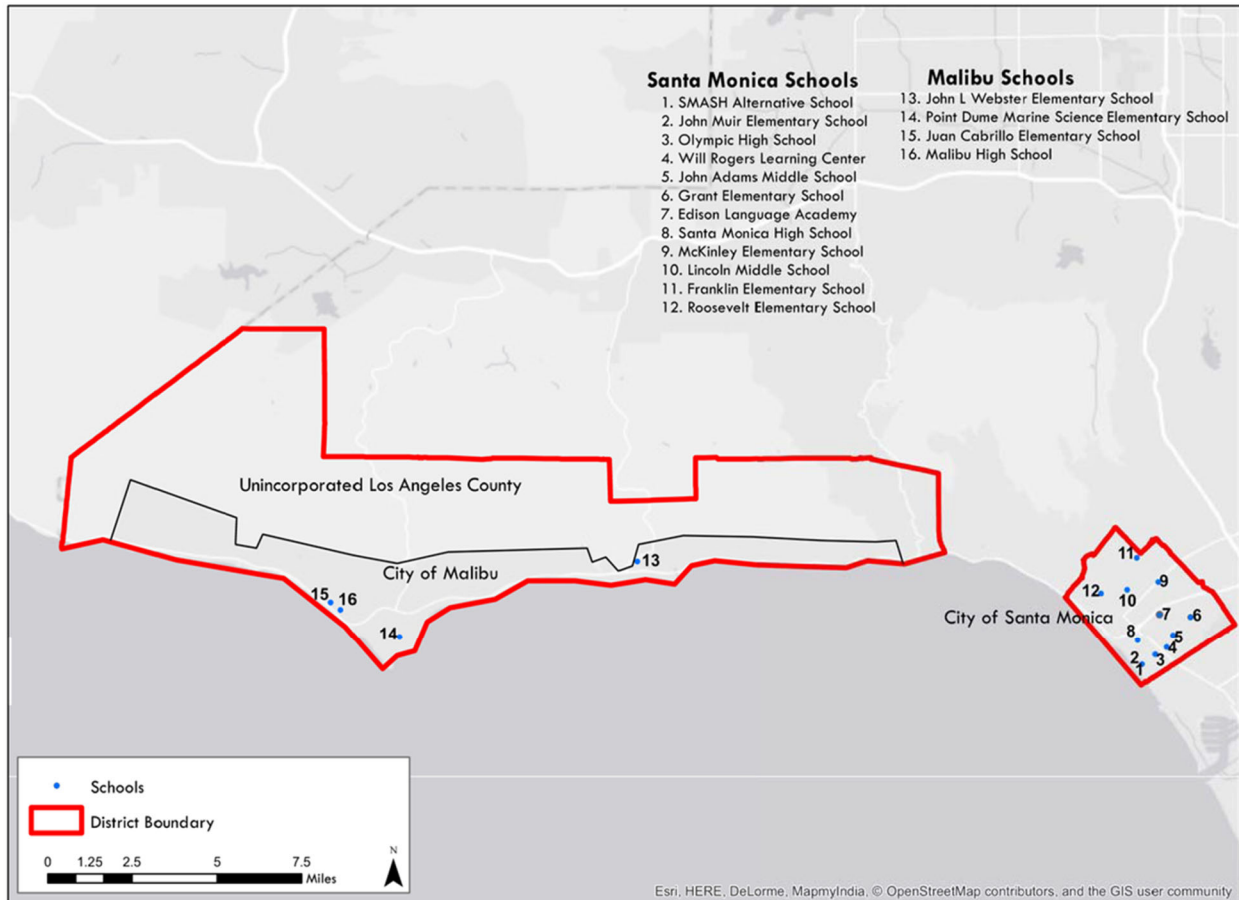
Over the following three years, the City of Malibu and the SMMUSD requested additional time to negotiate, enter mediation, engage additional consultants and consult with their City Council and Board of Trustees, respectively. They drafted documents they referred to as the “three agreements” and published drafts of these documents on their respective websites. They discussed the draft agreements in public forums and continued to negotiate and mediate. Representatives for the City and the SMMUSD continually attended County Committee meetings, sometimes in person and sometimes virtually, to provide updates to the County Committee.

On July 11, 2024, the City of Malibu, followed by the SMMUSD, communicated with the County Committee that they wanted the petition review to move forward. Representatives of both parties attended the August 7, 2024 meeting of the County Committee and requested that review of the petition move forward. County Committee Chair Suzan Solomon determined that the public hearings required to review the petition be held as soon as possible. Public hearings were held in Santa Monica on November 8, 2024, and in Malibu on November 13, 2024; each event was well attended in person as well as online. A final public hearing was held in Santa Monica on March 17, 2025, concluding the public hearing process. Following that hearing, staff developed another feasibility study examining the Nine Conditions under EC 35753. This final feasibility study is also supported by a fiscal report developed by School Services of California.

At a regular meeting currently scheduled for April 2, 2025 in Downey, the County Committee will review this feasibility study and gather additional written and oral testimony by the impacted parties. The expectation is that the County Committee will vote on the petition. If the County Committee approves the petition, it will be moved to the SBE for final review. If the County Committee denies the petition and one of the parties appeals, it will also be moved to the SBE for final review.

III. DESCRIPTION OF PROPOSAL AREA

The area proposed for unification, to form a Malibu USD within, is contained in the boundaries of the City of Malibu and additional unincorporated territory of Los Angeles. This territory falls currently within the Santa Monica-Malibu USD that abuts the City of Malibu to the north. In the current territory of the SMMUSD, the City of Santa Monica territory is represented to the South.



Santa Monica-Malibu Unified School District

Date: 2/21/2017

IV. DESCRIPTION OF IMPACTED SCHOOL DISTRICT

SANTA MONICA-MALIBU USD

According to the website of the SMMUSD, it describes itself as follows:

“The Santa Monica-Malibu Unified School District is headquartered in Santa Monica and serves the diverse coastal communities of Santa Monica and Malibu. It is located in Los Angeles County and serves 8,376 students in Transitional Kindergarten through 12th grade in nine elementary schools, three middle schools, two comprehensive high schools, a continuation high school, a K-8th grade alternative school and Project-Based Learning High School pathway. SMMUSD employs approximately 1,300 staff members including about 600

certificated and 700 classified employees. The district is also home to 11 early childhood education centers and an adult school. The first classroom opened with 52 students in March 1876. SMMUSD's annual unrestricted general fund budget for the 2024-25 school year is about \$154 million.

SMMUSD is proud to be supported by the Santa Monica Education Foundation. The Education Foundation is an independent 501(c)(3) nonprofit organization that exists solely to raise funds for programs in SMMUSD, for Santa Monica schools. Each year, annual donations and the Ed Foundation's endowment fund millions of dollars of programs for students, including visual and performing arts, STEM, instructional assistants, student wellness, library support and other enrichment programs. A similar foundation is in formation stages to support Malibu schools.

U.S. News and World Report has named both Santa Monica High School and Malibu High School as Top High Schools in the nation and state, reporting Samohi with the ranking of 850 in the nation and 120 in the state and Malibu High School for rankings of 573 and 77, respectively in 2024.

Extra-curricular programs including visual and performing arts and athletics at the high school level are focal points within each campus. Students begin their visual and performing arts instruction in elementary school and access continues through high school.”

The City of Malibu has 10,161 residents, and the City of Santa Monica has 88,925 residents, according to the 2020 U.S. Census.

The City of Santa Monica is a small city bordering the Pacific Ocean and is both a recreational and entertainment destination for Southern California. It contains areas that range from in-filled city neighborhoods to canyon and mountain areas, as well as large undeveloped parklands and significant coastal areas along the Pacific Ocean.

The City of Malibu is a more suburban/semi-rural city bordering the Pacific Ocean. It contains significant canyon and mountain areas (both residential and recreational/undeveloped). The area covered by this proposal includes territory currently in the SMMUSD that is outside the City of Malibu and deemed unincorporated (see map above), and that area is significantly more rural than the area of the city abutting the Pacific Ocean coast.

V. PETITIONER RATIONALE

The rationale for this proposal was articulated in the resolution submitted by the Malibu City Council:

1. The city centers of Malibu and Santa Monica are separated by several miles, and Santa Monica and Malibu have become distinct communities.

2. Santa Monica-Malibu USD's central office is located in Santa Monica, a significant distance from even the closest portions of Greater Malibu.
3. Residents of Malibu have expressed concern and frustration that they are not adequately represented by the Santa Monica-Malibu USD governing board due to its at-large system of election, and that their concerns about the policies and practices of Santa Monica-Malibu USD go largely unaddressed.
4. The unification of a Malibu USD from the existing territory of Santa Monica-Malibu USD will benefit all children in Santa Monica, as well as Greater Malibu.
5. Organization of a Malibu USD enables all residents of Greater Malibu to have representation on their local school board through adoption of by-trustee-area elections.

VI. POSITIONS OF THE MALIBU CITY COUNCIL AND THE SANTA MONICA-MALIBU USD GOVERNING BOARD

As effaced by the language above from the city's resolution dated September 16, 2015, the City Council of Malibu supports the unification proposal

Over the multiple years that this petition has been under review, the impacted parties have conducted multiple studies, negotiations, and mediation. Multiple negotiating committees have been formed and have conducted regular dialogue throughout. At various times, the parties stopped negotiating and requested that the petition review move forward, only to inform the County Committee that they were back at the table and to request a pause of the review of the petition.

To date, though it has participated fully in negotiation and mediation, the SMMUSD governing board has not issued a resolution supporting the creation of a Malibu USD from a portion of its territory. It has stated on numerous occasions, including at the March 17, 2025 public hearing, that the district supports breaking up into two unified districts; however, it has not endorsed a specific plan or petition to do so. At the time of the development of this feasibility study, it is not clear whether the parties have or will recommence their negotiations or other activities designed to promote a plan to form a Malibu USD.

VII. HISTORICAL BACKGROUND AND EDUCATIONAL PLAN

According to the SMMUSD, students residing in Malibu area have attended the district since its formation in 1875 and the SMMUSD, in historical and current form, has existed for more than 70 years.

Much has been made by the City of Malibu, both in its public materials and in its presentations before the County Committee, that the geographic composition of the district would not be

allowed today, given that the City of Malibu and the City of Santa Monica are separated by several miles along the coast of the Pacific Ocean. It is a legally chartered district by the State of California, charged with responsibility for educating all of the students within its territory. Throughout its existence, while various petitioners have sought to create a Malibu USD, the State of California has not ordered a remedy of any aspect of the composition of the SMMUSD.

Again, despite charges to the contrary in its proposals, other presentation materials and public statements by the City of Malibu and Malibu residents, the education provided by the SMMUSD, by all metrics required to be analyzed by the State of California, is more than adequate. Staff is well aware that public opinions on the quality of school districts and individual school sites, especially as they apply to specific students or groups of students, may vary widely. We are guided by state-mandated metrics of sufficiency and performance, not public opinion polls. The SMMUSD is an extremely high-performing district according to the most recent assessments (which were suspended during the COVID-19 pandemic), noting that the district has a graduation rate of approximately 95% out of all students, compared to a statewide graduation rate of 84.7%, according to the CDE. The academic success of the SMMUSD includes students who attend the district's school sites in the Malibu area. In no particular order, the Math, and the English Language Arts (ELA) 2023-24 state assessments for Webster Elementary were both 80%; Malibu Elementary was 61% and 62%; Malibu Middle School was 52% and 69%; and Malibu High School was 47% and 76%].

It is also a district that serves both students of high academic achievement and those of significant need (including English Language Learners (ELL) (8.6%), foster youth (.2%), homeless youth (.5%), students with disabilities (12.1%) and youth from families categorized as low socioeconomic status (SES) (27.5%)), according to the CDE's school dashboard (<https://www.caschooldashboard.org/reports/19649800000000/2020>).

It is not possible to opine of the educational success of the City of Malibu because it is not a local educational agency (LEA), nor did any of its submitted or presented materials include any form of educational plan. It is not clear nor has it been articulated what kind of school district the City of Malibu intends to support in the form of a Malibu USD, nor what kind of district will actually be formed and operated. In the City's Feasibility Study, there is reference to expanding Career and Technical Education (CTE), Advanced Placement, Language Immersion, Elementary Arts, English Language Learning (ELL) support, and other offerings at Malibu school sites, among other programs, claiming there is limited to no access to these programs locally. It is not clear, given the acknowledged significantly smaller size of a Santa Monica USD, if formed, that any programs of this sort will be offered at Malibu school sites beyond what is required by California law.

In addition, it is not clear who will be charged with guiding it, what educational approach will be taken, what particular programs will be emphasized or discontinued from the current offerings of the SMMUSD (including programs that Malibu residents can participate in at the SMMUSD if they travel to Santa Monica school sites), etc. Instead, the City of Malibu, in its proposal, lists a series of visions it has for a MUSD and complaints about the SMMUSD (such as the office and schools are too far, the Malibu community is an afterthought, there is not adequate representation on the school board (even though there is one Malibu resident on the seven-member board which is consistent with the percentage of the district's population who reside in Malibu), how the

Malibu community perceives the SMMUSD reaction to past and the present wildfire events, etc.). There are also consistent complaints about Malibu-sourced money (parcel tax revenues, foundation donations, etc.) not being utilized to support Malibu students only. There is an expectation that any new Malibu USD would be a basic aid district in California and that it would be able to retain its geographic portion of the parcel tax currently levied on the entire SMMUSD. Though these issues have been much discussed over the history of this petition, including past negotiations and mediation among the impacted parties, there has been no agreed upon course of action by the parties.

To be clear, the Education Code (“EC”) does not require that petitioners such as the City of Malibu submit a complete prospective educational plan prior to submitting a proposal. In addition, the visioning process that the community apparently went through to determine its desired ‘pillars of education’ is an admirable effort. However, the lack of any indication of what a Malibu USD will look like, what it would do for its students, and what educational issues or deficits of the SMMUSD (with the exception of distance to the district office and Santa Monica area schools) it would cure or do better than the SMMUSD, are telling in their absence, especially given the length of time some in the City of Malibu have advocated for a Malibu USD. In comparison with a school district like the SMMUSD, with approximately a 95% graduation rate, a new Malibu USD would be charged with increasing student success beyond that metric, and would need to implement very specific educational measures, which the City of Malibu has not hinted at; it would also need to staff and fund those kinds of initiatives.

Under the Nine Conditions required to be analyzed by the County Committee under EC 35753, it is critical to determine, among other analyses, the sufficiency and sustainability of the educational programs, including whether the proposed reorganization would negatively impact those programs and students. The County Committee is entitled to inquire exactly what the educational plan is for a Malibu USD. These are outstanding questions that staff was not able to explore based on the materials submitted and the presentations made by the petitioners over the years.

VIII. ANALYSIS OF MANDATED CONDITIONS AND RECOMMENDATIONS

EC §35753 identifies Nine Conditions which must be reviewed by the County Committee as part of the decision-making process related to proposed school district reorganizations. As this petition concludes the regular review stage under EC 35753, the County Committee must determine if all of these conditions are substantially met. Thus, this report provides a review of the Nine Conditions based on information that is currently available, which is discussed in part with the fiscal analysis conducted by SSC. Along with many presentations from the Petitioners and the District, as well as voluminous public comments over the years, in November 2024, the City of Malibu also provided its own feasibility study. The District objected that concepts in that feasibility study were mediation privileged and should be disregarded by the Committee. The City of Malibu disagreed. The County Committee requested that the District explain its position about the applicability of the mediation privilege to the County Committee’s consideration of the Petition for Unification and submit a chart identifying specific language in the Malibu feasibility study that it believed is covered by the privilege, and received no further response.

Staff's recommendation as set forth in this Report reflects Staff's objective analysis of whether the proposal as submitted can substantially meet the Nine Conditions based on information in the record and the fiscal analysis provided by the Committee's consultant, School Services of California, Inc. The recommendation in this Report does not depend on assertions made in the feasibility study submitted by Malibu. Staff further notes that the feasibility study submitted by Malibu is predicated on the enactment of a complex tax exchange model that is beyond the Committee's powers to adopt, has not been agreed to by the parties, and may require the California State Legislature to enact special legislation.

For this stage of the petition review, the County Committee is required to approve or deny the petition as submitted. However, the EC does not mandate that the County Committee approve proposals where any, a majority or all of the conditions are substantially met. Likewise, the EC does not mandate that the County Committee deny a proposal where all, many or some of the conditions are not substantially met. The EC provides the County Committee with broad authority to analyze factors it deems relevant and to assign to those factors the requisite weight they choose to determine how to vote on the proposals that come before it.

According to the California Department of Education (CDE), in their School District Organization Handbook (<https://www.cde.ca.gov/re/lr/do/#chapter6>), there is broad discretion for the County Committee in making decisions about proposals presented to it with the regular review process under EC 35753. Please note that in this context, the CDE refers to "the Board" which indicates the SBE. On a local level, we infer similar authority and discretion to the County Committee:

"In considering proposals for district reorganization, county committees and the State Board of Education must determine whether the nine conditions in *Education Code*(EC) Section 35753(a) are substantially met. Those conditions are further clarified by *California Code of Regulations (CCR)*, Title 5, Section 18573. By its own terms, *EC* Section 35753 provides that, if the conditions set forth in subdivisions (a)(1) through (10) are met, the State Board of Education (and the county committee) "may" approve a proposal for the reorganization of a district.

The term "may" denotes discretion on the part of the County Committee and the State Board of Education. Thus, the conditions in *EC* Section 35753 constitute a minimum threshold, which must be met before the State Board of Education or county committee is even vested with discretion to act. There is no requirement to approve the City of Malibu's Petition for Unification even if the conditions have been met. Similarly, there is no requirement of disapproval when the conditions have not been met. (*Hamilton v. State Board of Education* (1981) 117 Cal. App. 3d 132; *Burch v. State Board of Education* (1998) Los Angeles Superior Court Case No. B5034463). Subdivision (b) of Section 35753 gives the State Board of Education authority to depart from the conditions when it determines that exceptional circumstances exist."

Please note that the last sentence of this excerpt does not apply to the County Committee.

In analyzing the petition, it is important for County Committee members to note that any decision they make is advisory only. It is a recommendation to the SBE, which has final authority to approve new unified school districts. If the County Committee approves this petition, it will still go for review before the SBE. If the County Committee denies the petition and an impacted party appeals that decision, it will also go for review before the SBE.

CONDITION 1

The reorganized districts will be adequate in terms of number of pupils enrolled.

The County Committee may approve a proposal for reorganization of districts if the new district is adequate in terms of the number of students enrolled. Section 18573(a)(1)(a) of Title V, California Administrative Code (CAC), specifies that a unified district must have a projected enrollment of at least 1,501 students.

Staff has been informed anecdotally that wildfires (which occurred before the COVID-19 pandemic and more recently in January of 2025) have driven the population of students enrolled in Malibu area schools below 1,501 in part because families who lost their homes may not yet have been able to return. Though the more recent wildfires did not cause significant loss of homes in Malibu specifically, they certainly caused great disruption in the community since they were adjacent to a major burn area in Pacific Palisades, as well as rendering major roads impassable and some utility services suspended. It is not clear if those families who left in 2018 returned to Malibu area schools' enrollment lists during the pandemic, nor if any families impacted by the most recent area fires will return. The impact on overall enrollment in the district, both in person and online students, would need be confirmed. The most recent figures available to verify numbers of SMMUSD students at all Malibu school sites (Malibu High School, Malibu Middle School, Malibu Elementary School and Webster Elementary School) is 1,063, based on most recent Average Daily Attendance (ADA) reports submitted to LACOE.

In addition, recently released U.S. Census data indicated a drop in the overall population in the City of Malibu, which will likely impact a new Malibu USD's ability to yield enough students to meet the 1,501 minimum enrollment threshold in order to become a separate, new USD. While additional data would be needed, there would be a legitimate concern that this condition could even be met.

In addition, the widespread experience of declining enrollment in many school districts in Los Angeles County may also impact a newly formed Malibu USD and its ability to enroll an adequate number of students to field a USD. The State of California has determined a threshold of 1,501 for a USD, indicating that this is the minimum threshold required to have sufficient students to field and finance the programs that a comprehensive school district requires.

Further, while some local districts have a significant number of permitted students, which bolster their enrollment numbers, given the geographic challenges cited consistently by proponents of a Malibu USD, it seems unrealistic to expect hundreds of permitted students who are not residents of the Malibu area to drive or be driven there for school each day. It is not clear if online enrollment could supplement or possibly backfill future shortfalls in enrollment, but online enrollment as a possible replacement for hundreds of students- comprising about one-third of the minimum enrollment starting threshold of 1,501, is not a substitute for physical enrollment within a proposed new school district's territory. Furthermore, online enrollment of future students, irrespective of residency requirements, is also not part of the current petition under consideration.

In numerous presentations to the County Committee, representatives of the City of Malibu have stated that enrollment has declined because of dissatisfaction with the SMMUSD, and that those students would “come back” if a new Malibu USD were to be formed. Since any formation is many years away (given the required review before the SBE, environmental review under CEQA and an election, possibly linked to special legislation), it seems unrealistic that planning for an influx of hundreds of students would be prudent. They will need to be dealt with piecemeal if, and when, they move into Malibu and choose to enroll in public school. Stating, as has been said in multiple meetings, that the “spirit” of this condition is met is disingenuous. It is not met.

Finally, unlike other areas of Los Angeles County, the Malibu area does not have significant land for potential building of new housing. It will not be host to large housing developments (both due to unsuitability and cost of adding new housing to current land resources). If current or former (pre-wildfire, or pre-pandemic) students and their families do not return, it will be extremely challenging to maintain a USD.

RECOMMENDATION

Because the current enrollment in Malibu area schools is far below the required threshold of 1,501 students, staff finds this condition is not substantially met.

CONDITION 2

The districts are each organized on the basis of a substantial community identity.

The CAC, Title V, Section 18573(a)(2)(A-G), provides guidance that community identity should be determined using criteria such as: isolation; geography; distance between social centers; distance between school centers; topography; weather; community, school, and social ties; and other circumstances peculiar to the area. The County Committee may determine which aspects of community life and description constitute relevant community identity for its review purposes.

The proposal area, historically a part of the Santa Monica-Malibu USD, includes the City of Malibu and territory to its north, unincorporated Los Angeles territory, which is currently part of the Santa Monica-Malibu USD. Because the proposal to form a Malibu USD concerns a current

school district that contains two distinct cities within its territory (Malibu and Santa Monica), it is natural to expect that residents of each city would efface affinity with their specific city. However, as stated earlier, residents of Malibu have always been educated by the Santa Monica-centric school district since its formation more than 100 years ago and have been part of the district formally for more than 70 years. Unlike transfer of territory proposals, where a group of homeowners states that they have greater affinity and community identity with a community they seek to relocate into, in this case the homeowners and residents of Malibu have always been a part of the Santa Monica-Malibu USD, thus there can be no claim that they are not members of that school district community. That they seek an exclusive community comprised of Malibu-area only, is the clear intention of this proposal.

While it is stated that the petitioners and their supporters feel a sense of community identity within Malibu, the region in general shares the same coastline, transportation arteries, commercial, recreational, shopping and entertainment centers and, most importantly, students. It is unrealistic to believe that Malibu residents (and thus Malibu students) never leave Malibu (notwithstanding COVID-19 pandemic restrictions or wildfire aftermath restrictions), and vice versa, that residents and students of Santa Monica never partake of recreational, civic, commercial and other offerings in Malibu.

The notion that proposal area students are being excluded from their true school district, and all that they could avail themselves from it, is not supported since they have always been part of the Santa Monica-Malibu USD, known as one of the highest-performing districts in California and beyond. It is true that many families and students want different things from their school district that may be on offer, but that is not the same thing as categorizing the Santa Monica-Malibu USD as inadequate. Students in Malibu attend SMMUSD schools currently because their homes are located in that district and they have access to the full offerings of any student in the district. In various public forums and in submissions sent to the County Committee, Malibu residents have expressed concerns about fewer languages being offered at one site or another (at Santa Monica-area schools as opposed to Malibu schools), displeasure at how the SMMUSD reacted to both the earlier wildfires and more recent occurrences, and other issues, which are similar to concerns about personal preferences voiced in virtually every school district in Los Angeles County.

Parents make demands, districts study issues and respond, but the perception of adequacy remains extremely subjective. When state and local officials judge the adequacy of a school or school district, we use objective measures built on student achievement. It is clear that the City of Malibu perceives that the offerings at Malibu school sites are not adequate or similar in the few items they have cited, but that view is not supported. Every district fields certain educational offerings at limited sites. The economics of managing a school district prohibit offering everything at every school building, though that is often what parents demand. In the case of the SMMUSD's educational offerings differing in Malibu versus in Santa Monica, that is standard and is not a facet of community identity. In a large geographic area, the 'educational' community identity is a district-wide standard, not one based on an individual neighborhood.

School district boundaries and city boundaries are rarely coterminous in Los Angeles County, and in much of California, and the County Committee has never been directed by the State of California to reconcile these disparate borders. Nearly every district within Los Angeles County

contains territory outside of its largest city, and nearly every city in Los Angeles County has multiple school districts running through it. Sometimes the disparity between the various cities contained within a school district is stark, for example Duarte USD, which contains the City of Duarte and the City of Bradbury, very different communities, or the ABC USD, which contains both Cerritos and Hawaiian Gardens, also very different communities. There are several school districts that contain more than 5 cities within their borders, and several cities that contain more than 5 school districts. This is not problematic in our region, it is the norm. The idea of a Malibu-only school district as a necessity for sufficient educational purposes or community cohesion is not supported. Like most other school districts, the SMMUSD contains more than one city within its boundaries. Even the notion of distance is not unusual in Los Angeles County. We host numerous districts (especially in the Antelope Valley and Santa Clarita Valley areas) where school buildings are far from district offices.

While there may be differences between the City of Malibu and the City of Santa Monica, whether actual or perceived by their respective residents, there is no indication that these differences are damaging to the educational plan of the Santa Monica-Malibu USD. Nor is there any need to reconcile these differences by separating groups of students who have been part of the same school district historically, and currently exhibit significant academic success.

RECOMMENDATION

Residents of the proposal area, like all residents of Los Angeles County, likely share a strong community identity with their locality in general or their neighborhood (including the cities of Malibu and Santa Monica and other surrounding areas to the north, east and south), as well as with whatever school district their children are enrolled in, because that is where they live. Community identity becomes an amalgam rather than a specific, definable sentiment or status. Los Angeles County contains schools with large geographic footprints, small footprints, hundreds of thousands of students and hundreds of students, and all of them exhibit a cohesiveness based in part by their shared school district residence, not just based on their city or town or area residence. It is reasonable to like or feel a part of any broader locality when one lives in or near any border. It is clear that the petitioners and their supporters feel otherwise, to the point of claiming City of Malibu as their true district, but their impressions are not determinative here. While boundary areas in any city or district will always have some elements in common with the areas they border, community identity must consider the city and the school district independent entities.

The residents living within the proposal area do not evidence greater community identity with the City of Malibu to the degree that they cannot remain a part of the SMMUSD, specifically because they are residents of both entities equally. Proximity to school sites does not, in and of itself, establish community identity.

Proposals to form unified school districts are requests for changes to permanent boundaries. They should only be undertaken based on evidence of compelling reasons to make such changes related to objective barriers to students' educational achievement, and guided by the mandated nine conditions of review. No such compelling reason has been presented in this case to date that cannot be mitigated by the current collaborative practices of the Santa Monica-Malibu USD to serve both the City of Malibu and the City of Santa Monica.

It is clear from the oral and written testimony provided by many residents of Malibu that they are deeply invested in their community and do not feel adequately served or even welcomed in the SMMUSD. The implication that this proposal should be approved because the City of Malibu wants it, and in their assessment feel community identity only with the City of Malibu, should not be remedied by a process as serious and with such significant consequences as forming a new USD and taking territory from a high-performing current USD, especially given the potential fiscal impacts for the current and any newly formulated USDs. Therefore, it is recommended that the County Committee deem this condition to not be substantially met.

CONDITION 3

The proposal will result in an equitable division of property and facilities of the original district or districts.

The division of real and personal property, funds, and obligations, except bonded indebtedness, shall be determined as provided in EC §§35560(a), 35561, 35564, 35565, and 35736.

Pursuant to EC §35736, all property, funds, and obligations, other than real property and bonded indebtedness, shall be divided pro rata between the districts based on the number of affected students as a percentage of the SMMUSD's total student population in order to result in an equitable division of the property, funds, and obligations of the districts. In this proposal, those calculations are complicated by differing perceptions among the impacted districts and parties, despite the engagement of multiple teams of fiscal consultants. The SMMUSD has stated that the creation of a Malibu USD would place it at a fiscal disadvantage due to loss of assessed valuation and enrollment-based student funds, and loss of revenue from an existing parcel tax for all parcels that would leave the SMMUSD if this petition is approved. In previous discussions and presentations, these factors are the rationale for the SMMUSD's lack of support for the proposal. They have alerted reviewers to the fact that there would be a "cliff" to fall off of in approximately 10 years. The proponents of the proposal by the City of Malibu have disputed this assessment. To date there is no definitive answer or agreement, despite multiple attempts to negotiate or mediate these issues into an overall agreement, conducted over the past nine years.

SSC examined Condition 3, beginning on page 10 of Appendix A, attached. Readers of this report are directed to review that in-depth analysis, which covers real property, personal property, debt/bond obligations and employee-related obligations (such as retirement), all of which are required to be reviewed by the County Committee when a reorganization is under consideration. SSC concluded:

"This criterion is likely the most critical given the assets noted that would need to be divided. This has also been one of the main points of contention between the two parties over the years. It is likely that—as called for in the Education Code—should the Los Angeles County Committee vote to approve the proposed reorganization, an arbitrator or board of arbitrators will need to be convened to arrive at an equitable division of property."

RECOMMENDATION

In light of the SSC analysis, and the difficulty the parties have had to date finding any joint solutions, especially as they may indicate the financial costs of creating a Malibu USD out of territory currently within the Santa Monica-Malibu USD, it seems certain that a protracted financial examination and negotiation or arbitration would have to be undertaken if the proposal is approved in the regular review process under EC 35753. At this stage, there is not enough definitive information about exactly how such a financial workout would be implemented to find this condition currently substantially met.

CONDITION 4

The reorganization of the districts will preserve each affected district's ability to educate students in an integrated environment and will not promote racial or ethnic discrimination or segregation.

The California Code of Regulations, Title V, Section 18573(a)(4)(A-E), states that:

“To determine whether the new districts will promote racial or ethnic discrimination or segregation, the effects of the following factors will be considered:

The current number and percentage of pupils in each racial and ethnic group in the affected districts and schools in the affected districts, compared with the number and percentage of pupils in each racial and ethnic group in the affected districts and schools in the affected districts, if the proposal or petition is approved.

The trends and rates of present and possible future growth or change in the total population in the districts affected, in each racial and ethnic group within the total district, and in each school of the affected districts.

The school board policies regarding methods of preventing racial and ethnic segregation in the affected districts and the effect of the proposal or petition on any desegregation plan or program of the affected districts, whether voluntary or court ordered, designed to prevent or alleviate racial or ethnic discrimination or segregation.

The effect of factors such as distance between schools and attendance centers, terrain, and geographic features that may involve safety hazards to students, capacity of schools, and related conditions or circumstances that may have an effect on the feasibility of integration of the affected schools.

The effect of the proposal on the duty of the governing board of each of the affected districts to take steps, insofar as reasonably feasible, to alleviate segregation of minority students in schools regardless of its cause.”

As a matter of County Committee policy, the County Committee may also consider:

- participation in extracurricular activities;
- equipment of affected school districts;
- state of facilities of affected school districts;
- perception of staff, administrators, and community regarding whether schools are segregated; and,
- racial/ethnic make-up of staff and administration.

Beginning on page 16 of Appendix A, SSC examined the current ethnic/racial data available about students in the Santa Monica-Malibu USD. SSC stated:

“[To the extent that each school district is required to spend supplemental grant dollars generated in proportion to its Unduplicated Pupil Percentage (UPP), the expenditure requirement would increase for the remaining Santa Monica USD from the current per student average.”]

While enrollment for Fall 2025 is not yet known, and enrollment projections into the future for both a resulting Santa Monica USD and a newly formed Malibu USD cannot be made without that underlying data, it is clear that, even on the highest-level analysis, the Malibu USD, if created, will be an entity that is vastly more White than the resulting Santa Monica USD or the current SMMUSD.

RECOMMENDATION

The potential shift of the students from the proposal area within the Santa Monica-Malibu USD to the new Malibu USD would have a discernable impact on the ethnic or racial distribution at both districts (a newly formed Malibu USD and at the resulting Santa Monica USD), as compared to the current composition of the SMMUSD, in terms of dilution. A Malibu USD would not have enrollment of a significant number of students of color, and a SMUSD would have increased enrollment of students of color as a percentage of its total enrollment. If the proposal is approved, indicators are that, given the ethnic/racial shift in student population should a Malibu USD be created, there may be discriminatory impacts on students. Therefore, it is recommended that the County Committee deem this condition to not be substantially met.

CONDITION 5

Any increase in costs to the state as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.

Ultimate approval of this proposal could shift more than 10% of the students in the Santa Monica-Malibu USD to the Malibu USD (depending on verification of Fall 2025 enrollment and detailed enrollment projections into the future). In that regard, costs to the state need to be examined. Because the SMMUSD is currently a state basic aid district, meaning it derives the majority of its revenues from local taxes and not from state support, maintaining that status would be a critical goal of the district following any creation of a Malibu USD, given that it would represent a loss of taxable property, parcel tax revenue and a loss of enrolled students.

Readers are directed to examine the detailed analysis prepared by SSC, beginning on page 19 of Appendix A, which includes an explanation of the Local Control Funding Formula (LCFF), the mechanism by which school districts receive most of their state-supported aid:

“As part of the 2013 State Budget Act, the Legislature passed the LCFF. This historic reform of the state’s school finance system eliminated revenue limits and more than 40 categorical programs. In its place, the state established a system of funding local educational agencies (LEAs) through base grants, add-on funding for K-3 class-size reduction and career technical education, and supplemental and concentration grants to provide extra funding to districts with students from low-income families, students who are English learners, and foster youth.”

Given the uncertainty about Santa Monica USD’s ability to maintain basic aid status after a Malibu USD is formed, it is not clear whether or not additional state aid would be needed, or when. The SMMUSD has cited that, in approximately 10 years, any offered remuneration from a Malibu USD (which the parties have negotiated for many years) would be used up keeping it at current parity; thus, significant fiscal shortfalls could occur. The district has stated that, following any reorganization without further financial assurances in place, it would need to begin making cuts to programs and staffing immediately to prepare for that out-years shortfall. At this time, it is not possible to know whether or not these concerns are valid or whether a negotiated financial settlement about debt, facilities, etc. would bring clarity to the process. To date, that negotiated financial settlement is not in place.

RECOMMENDATION

Given the many financial unknowns at this time, it is not possible to predict whether or not additional state costs/support would be necessary to maintain the resulting Santa Monica USD, should a Malibu USD be formed from territory of the current Santa Monica-Malibu USD. Funding based on enrollment would be lost for the Santa Monica-Malibu USD, as would the ability to tax property in Malibu, if homes and students are transferred to a Malibu USD. Absent another negotiated settlement, it is not clear if both resulting districts could maintain basic aid status or if a resulting Santa Monica USD would need additional support from the state. Therefore, it is recommended that the County Committee deem this condition to be not substantially met.

CONDITION 6

The proposed reorganization will continue to promote sound education performance and will not significantly disrupt the educational programs in the districts affected by the proposed reorganization.

Condition 6 considers the effect of the proposed unification on the educational programs of the districts affected by the reorganization, in this case the current SMMUSD, a newly formed Malibu USD and the resulting Santa Monica USD.

There was much testimony assailing the educational plan of the Santa Monica-Malibu USD as it impacts students who are resident in the Malibu area, with claims of inadequate offerings and disparate treatment. The Santa Monica-Malibu USD stated emphatically that educational quality is robust throughout the district, that facilities in the Malibu area have been significantly invested in, and that the district continues to be recognized as one of high-performance. Staff did not find any legitimate assessment that spoke to academic insufficiency in any of the schools in Santa Monica-Malibu USD, including those located in City of Malibu.

In their analysis of Condition 6, SSC indicated that there is naturally a connection between a district's educational programs and its fiscal soundness, including the availability of resources and an expectation of those resources being available in the future. The proposal to form a Malibu USD does not appear to be necessary in order to continue to promote sound education performance. Even without an articulated educational plan, it seems highly likely that a new Malibu USD will have the resources it needs to adequately educate its enrolled students. Given a much smaller size and enrollment, a new Malibu USD may not be able to offer everything that the current SMMUSD offers.

However, according to the Santa Monica-Malibu USD, their ability to promote sound education performance will be threatened by the creation of a Malibu USD due to the loss of resources the district states will likely occur. Additional, definitive, information about the fiscal impacts of such a reorganization would need to be gathered based on what the new and newly reorganized districts plan to offer, including programs that may need to be cut by either of the districts.

RECOMMENDATION

At this time, it cannot be determined whether the creation of a Malibu USD would negatively impact the ability of the resulting Santa Monica USD to promote sound education (in terms of its ability to finance current programs and educational offerings), nor is it clear what the educational plan of a new Malibu USD would look like. Until it is clear how this reorganization would be worked out on a fiscal basis, the impact on educational programs is not known. Therefore, it is recommended that the County Committee deem this condition to be not substantially met.

CONDITION 7

Any increase in school facilities costs as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.

There would be a significant division of facilities, all of which have current bond obligations related to them, should a Malibu USD be created from territory currently in the Santa Monica-Malibu USD. In its analysis, beginning on page 21 of Appendix A, SSC found:

“If new or modified facilities are necessary, the districts would likely fund any construction through a combination of local and state bond dollars, as well as developer fees and other local sources.”

In linking the necessity of increased costs for school facilities (beyond insignificant or incidental) to student enrollment (including projected enrollment), SSC found that there would be no increased costs. However, they founded that assessment on a potential decline in student enrollment in a Malibu USD. There are additional school facilities costs that may be realized by a new Malibu USD, such as administrative offices, bus/utility yards, building remodeling or environmental remediation/upgrading, etc. Some of those expenses may be the minimum operational footprint that a functioning USD needs to have, and others are entirely dependent on student enrollment or enrollment projections, as SSC found. Given yet another layer of uncertainty about what a Malibu USD would need, how many students it is likely to have, and what the workout cost would be for the facilities it seeks to acquire from the Santa Monica-Malibu USD, it is not possible to know if additional school facilities costs would be indicated by this reorganization. Further, it is not possible to know at this time if the resulting Santa Monica USD would have school facilities costs based on its loss of enrollment or other fiscal losses.

RECOMMENDATION

Because of the uncertainty regarding student enrollment and projected student enrollment into the future, it is not possible to predict what school facilities costs a new Malibu USD would have, or any residual facilities costs that may befall the Santa Monica USD following a reorganization. Therefore, it is recommended that the County Committee deem this condition to be not substantially met.

CONDITION 8

The proposed reorganization is primarily designed for purposes other than to significantly increase property values.

To evaluate this condition, the County Committee should analyze the rationale presented in the proposal for transfer. In addition, if the proposed reorganization creates a significant change in local property values, the County Committee should consider whether increasing property values is the *primary reason for the proposal*. However, in the case of the proposal to form a Malibu USD, it is clear that property values are generally much higher in Malibu than in Santa Monica, in many cases significantly so. Thus, it is clear that there is no demonstrated motive to raise real estate values as a result of the formation of a Malibu USD as the primary purpose of the proposal by the City of Malibu. Values may go up if buyers privilege the notion of a Malibu USD, but any rise would be built on values that are already higher than most in Santa Monica.

RECOMMENDATION

EC §35753(a)(8) does not state that transfers should be denied if property value increases are projected. This section states that a proposal may be approved if “. . . the proposed reorganization is *primarily designed for purposes other than to significantly increase property values . . .*” [emphasis added.]

It can be reasonably projected that most residents of the City of Malibu already have higher property values than most residents in Santa Monica, but there is no evidence that a significant increase in property values represents the primary motive for the proposal. Therefore, it is recommended that the County Committee deem s this condition to be substantially met.

CONDITION 9

The proposed reorganization will continue to promote sound fiscal management and not cause a substantial negative effect on the fiscal status of the proposed district or any existing district affected by the proposed reorganization.

The County Committee should consider financial trends of the affected districts and revenue gains and/or losses that may result from the proposed reorganization when examining Condition Nine. This information will be used to evaluate the proposal's effect on the viability of the reorganized districts to operate educational programs and to assess any negative impact to the fiscal management or status of the reorganized district(s).

In SSC's comprehensive analysis of Condition Nine and the financial implications of the proposed reorganization, which begins on page 22 of Appendix A, should be reviewed in detail.

It outlines critical financial assumptions and highlights information that is not known at this time. In summary, in examining the likely LCFF assessments and revenues of both a new Malibu USD and a resulting Santa Monica USD, compared to the current Santa Monica-Malibu USD, vastly different fiscal pictures emerge. No case is being made that the two districts, should the reorganization take place, move into the future independent of one another, need to have the same money, the same LCFF per student or the same access to any local revenues (which include both a current parcel tax within the Santa Monica-Malibu USD and a tax on residents of the City of Santa Monica that benefits, in part, all of the Santa Monica-Malibu USD). The financial pictures of districts in Los Angeles County differ vastly from region to region. However, it is not prudent to create a new school district if such a reorganization would visit financial challenges that are unreasonable on the district of origin, especially in a situation where there is no compelling reason to make the change (such as significant educational disparities).

It is a difficult task, especially with the information currently available, to predict fiscal and educational impacts of this proposed reorganization, both immediately and into the future. Since it is expected that the entity of a Santa Monica USD, following a reorganization that creates a Malibu USD, would still exist and still need to field adequate educational programs in a prudent financial manner, the best analysis possible must be advanced. In that regard, SSC's analysis of Condition Nine makes a dire prediction about a financial future (and the related educational impacts that may result from such financial situation) for a Santa Monica USD following reorganization and the formation of a Malibu USD. Staff concurs with those concerns and would reiterate to the County Committee that the parties have been unable to negotiate an agreement to move forward for nine years. The logical indication of this impasse, despite how close the parties have claimed to come at various times, is that the SMMUSD believes that a resulting Santa Monica USD would not have adequate resources, and that the City of Malibu, as petitioner for the formation of a Malibu USD, has been unwilling or unable to agree to make SMMUSD whole into the future.

RECOMMENDATION

It is concluded that this reorganization would negatively affect the fiscal management or status of the resulting Santa Monica USD, should it be approved. Therefore, it is recommended that the County Committee deem this condition to be not substantially met.

IX. STAFF RECOMMENDATIONS

After examining material currently available related to this reorganization proposal, both provided by or gathered by the relevant parties and from local or state sources and public events, and informed to a significant degree by the material and analyses provided by SSC, staff finds that eight of the Nine Conditions are not substantially met at this time (Conditions 1, 2, 3, 4, 5, 6, 7 and 9). Staff finds that one condition (Condition 8) to be substantially met.

Under the EC, the number of conditions met *in staff's assessment*, does not determine what recommendation or decision the County Committee will make. The County Committee may find all, a majority, or some of the conditions met, and still vote to deny the proposal. Similarly, the County Committee may find that none, few or some of the conditions are met, yet still has authority to vote to approve the proposal. The County Committee's authority lies in its

assessment of what is best for this specific situation and proposal, both in regard to individual Conditions and in the totality of the proposal, and its overall assessment that the Nine Conditions are substantially met.

In light of the significant authority vested in the County Committee by the EC, staff has examined the implications of both approval and denial of the current proposal under EC 35753.

The implications to this reorganization relate to the elements of the City of Malibu's original proposal, which were based on asserting distance and political concerns about representation of Malibu residents in the Santa Monica-Malibu USD. Subsequently, the SSC fiscal analysis found significant potential negative fiscal impacts and described the insufficiencies that may occur following any unification that takes Malibu territory out of the Santa Monica-Malibu USD.

Staff is informed and believes that resident students in the area proposed for a Malibu USD have access to enrollment in Santa Monica-Malibu USD schools now, and always have. Whether or not they find the Santa Monica-Malibu USD insufficient for their particular needs does not merit the creation of a new USD, especially in light of the potential negative fiscal impacts such reorganization would have on the resulting Santa Monica USD (meaning the current Santa Monica-Malibu USD). School boundaries are necessarily permanent and intended both to define overlapping and distinct communities and impart to districts the ability to manage their fiscal and enrollment affairs with as much certainty as possible, but also to honor the civic decisions made by authorities who mapped out and populated our County long before it was nearly fully built out, as it is today.

However, if these differences, both fiscal and otherwise, may be overcome or resolved by negotiation among the parties, there may be a pathway to approving the proposal that does not visit financial burdens on the Santa Monica-Malibu USD or any resulting Santa Monica USD, and that does not have remaining concerns about the sufficiency of a new Malibu USD (especially in terms of likely enrollment). As of the time of this petition review, those differences have not been resolved by the impacted parties despite the continual allowance of additional time for negotiation and mediation that has been granted by the County Committee since the petition was filed initially.

Staff's understanding of the City of Malibu and the proposal area is not bounded solely by definitive information, such as fiscal status, programs offered and student enrollment. This analysis is also informed by Staff's comprehensive review of events, communications and proceedings through the many years during which this proposal has been under consideration by the County Committee (recognizing that much of that time has been comprised of the parties attempting to negotiate and that no delays can be attributed to the County Committee's actions), as well as the input of hundreds of impacted residents from both Santa Monica and Malibu, all of which form the record in this matter.

Therefore, staff recommends that the County Committee take note of the concerns outlined above under the Nine Conditions and vote to deny this proposal. As stated above, a denial still affords the impacted parties the right to appeal this decision to the SBE. Likewise, an approval still requires a review of this petition by the SBE to confirm the formation of a new unified school district, followed by environmental review and an election, if ordered.

X.

ATTACHMENT

Los Angeles County Office of Education Reorganization Financial Feasibility Study

Santa Monica-Malibu Unified School District

March 3, 2025

(Data collected as of January 2025)

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Los Angeles County Office of Education Reorganization Financial Feasibility Study

Santa Monica-Malibu Unified School District

March 3, 2025

Executive Summary

The Los Angeles County Office of Education contracted with School Services of California Inc. (SSC) to update the 2022 Reorganization Financial Feasibility Study (2022 Study) on the proposed creation of a new Malibu Unified School District (USD) from territory that is currently a part of Santa Monica-Malibu USD.

For a unification, a county committee must determine whether the nine statutory criteria as set forth in Education Code Section 35753 et seq. have been substantially met prior to rendering a decision. The analysis is based on the specific parameters of the petition submitted by the City of Malibu to reorganize Santa Monica-Malibu USD and create the proposed Malibu USD. As with the 2022 Study, this update is not evaluating whether each of the nine criteria have been substantially met. Instead, this analysis is focused on the fiscal impacts of the proposed reorganization as outlined in Criterion Number 9: Effect on Fiscal Status and Management. With regard to the remaining criteria, this analysis will discuss how the outcome of each may be impacted by the fiscal realities of a reorganization.

SSC staff has determined that, as it pertains to Criterion Number 9: Effect of Fiscal Status and Management, the proposed reorganization would have a substantial negative effect on the fiscal status of the remaining district—Santa Monica USD—and would not promote sound fiscal management. As to the evaluation of the financial impacts on the remaining criteria, SSC staff has determined that while all criteria would—in some way—be impacted by the fiscal realities of the proposed reorganization, the following three criteria would be most directly impacted:

- Criterion Number 3: Equitable Division of Property/Facilities—This criterion is likely the most critical as the proposed reorganization would include the division of real and personal property, debt, fund balance reserves and liabilities, student funds, and postretirement benefits. Given the two parties have been unable to reach agreement to date, it is likely that should the proposed reorganization be approved, an arbitrator or board of arbitrators will need to be convened—as called for in the Education Code—to arrive at an equitable division of property.
- Criterion Number 5: No Substantial Increase in State Costs—An increase in state costs would typically be a result of greater funding from the state under the Local Control Funding Formula. Based on the analysis conducted for Criterion Number 9, both districts would be community-funded districts post reorganization and, therefore, would not result in an increase in state costs.
- Criterion Number 7: No Substantial Increase to School Facilities Costs—An increase would only occur if additional facilities are needed to accommodate existing or projected enrollment post reorganization, as a result of the reorganization, which is unlikely given the current and projected enrollment of the proposed and remaining districts.

Los Angeles County Office of Education

Reorganization Financial Feasibility Study

Santa Monica-Malibu Unified School District

March 3, 2025

Two additional items of note. First, as briefly noted in this report, the Santa Monica-Malibu USD staff and representatives from the city of Malibu have been negotiating for several years to arrive at an agreement that would provide the remaining Santa Monica USD with additional support for a specified number of years to ensure that the disparities in funding between what Santa Monica-Malibu USD is generating now versus what it would generate as a standalone Santa Monica USD. While an agreement has not been reached, it is SSC's understanding that there is an "offer" on the table to mitigate the impacts. This report does not take into account any proposed fiscal mitigation measures between the two parties as no agreement has been reached, except to note that in the absence of such measures, the reorganization will cause a substantial negative effect on the fiscal status of the remaining existing district affected by the proposed reorganization.

Lastly, please note that as of the development of this report, the Palisades and Eaton fires have impacted Santa Monica-Malibu USD, as well as its staff, students, and families. The extent of the impacts on facilities, enrollment, etc. are not known at this time and may not be known for some time to come. As such, this report does not consider any impacts of the fires on either the existing school district or the community, nor how this could affect the reorganization and fiscal status post reorganization.

Study Purpose

The Los Angeles County Office of Education (LACOE) contracted with School Services of California Inc. (SSC) to update the 2022 Reorganization Financial Feasibility Study (2022 Study) on the proposed creation of a new Malibu Unified School District (USD) from territory that is currently a part of Santa Monica-Malibu USD.

For a unification, a county committee must determine whether the nine statutory criteria as set forth in Education Code Section (EC §) 35753 et seq. have been substantially met prior to rendering a decision. This update is not evaluating whether each of the nine criteria have been substantially met. Instead, this analysis is focused on the fiscal impacts of the proposed reorganization as outlined in Criterion Number 9: Effect on Fiscal Status and Management. With regard to the remaining criteria, this analysis will discuss how the outcome of each may be impacted by the fiscal realities of a reorganization.

The analysis and conclusions referenced within this report are based on a review and interpretation of existing law, as well as experience in this area and consultation with other experts in the field and should not be interpreted as a legal opinion. Should there be a question as to the applicability of a given provision or the legal impacts of such, SSC staff recommend legal counsel be consulted. In addition, the analysis provided is as of a point in time. The process the petition must undergo, as described later in this report, is lengthy and it will take several years before the petition is considered by the State Board of Education (SBE). In that time, fiscal and other factors are likely to change, which would impact the analysis and could result in differing conclusions.

Background

Petition

On August 31, 2017, the city of Malibu submitted a resolution, approved by its city council on September 16, 2015, to LACOE for the creation of a new unified school district to be known as the Malibu USD. The petition was put on hold so that Santa Monica-Malibu USD and the city of Malibu could negotiate a jointly agreed-upon separation. However, they were unable to reach an agreement and on October 29, 2020, the city of Malibu requested that the petition move forward. The petition was subsequently put on hold and restarted again as the parties have continued to attempt to reach an agreement for separation. The last request to restart the petition process was submitted on July 11, 2024.

The territory in question is now part of Santa Monica-Malibu USD and, per the resolution, consists of all the territory within the boundaries of the city of Malibu as well as the unincorporated area surrounding the city of Malibu, which the resolution refers to as Greater Malibu (Figure 1). The

Los Angeles County Office of Education Reorganization Financial Feasibility Study

Santa Monica-Malibu Unified School District

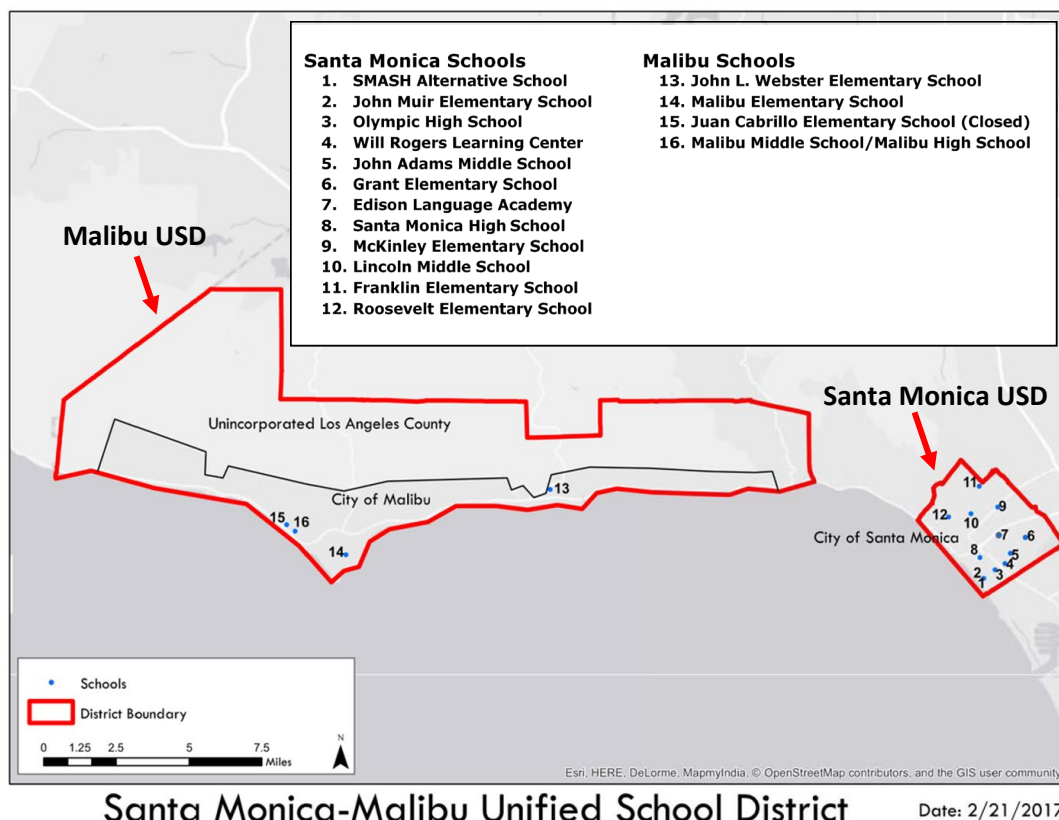
March 3, 2025

territory includes three elementary schools (one of which is closed), one middle school, and one high school as follows:

- Cabrillo Elementary School (ES)
(closed school site)
- Malibu ES
- Webster ES
- Malibu Middle School (MS)
- Malibu High School (HS)

The proposed unification would change the boundaries of Santa Monica-Malibu USD and transfer responsibility for the education of students enrolled at these four schools from Santa Monica-Malibu USD to the proposed Malibu USD.

Figure 1: Map of Santa Monica-Malibu USD—Outlining Remaining Santa Monica USD and Proposed Malibu USD Boundaries¹



Source: City of Malibu

¹Includes city of Malibu as well as portions of unincorporated Los Angeles County—Greater Malibu. Additionally, note that the map includes John Muir ES within the Santa Monica boundaries, though the school is no longer operating.

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Santa Monica-Malibu Unified School District

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The resolution submitted by the Malibu City Council states the following reasons for submitting the petition:

1. The city centers of Malibu and Santa Monica are separated by several miles, and Santa Monica and Malibu have become distinct communities.
2. Santa Monica-Malibu USD's central office is located in Santa Monica, a significant distance from even the closest portions of Greater Malibu.
3. Residents of Malibu have expressed concern and frustration that they are not adequately represented by the Santa Monica-Malibu USD governing board due to its at-large system of election, and that their concerns about the policies and practices of Santa Monica-Malibu USD go largely unaddressed.
4. The unification of a Malibu USD from the existing territory of Santa Monica-Malibu USD will benefit all children in Santa Monica, as well as Greater Malibu.
5. Organization of a Malibu USD enables all residents of Greater Malibu to have representation on their local school board through adoption of by-trustee-area elections.

Under the law, a reorganization petition should include a description of the territory to be transferred, a list of the school districts affected, a designation of no more than three chief petitioners, and an affidavit that all signatures on the petition are genuine. These elements are present in the submitted petition.

Santa Monica-Malibu USD

Santa Monica-Malibu USD is located in Los Angeles County and encompasses the cities of Santa Monica and Malibu, as well as unincorporated area surrounding the city of Malibu. It serves approximately 8,820 students in transitional kindergarten through grade 12 in 9 elementary schools, 3 middle schools, 2 comprehensive high schools, 1 continuation high school, 1 K-8 alternative school, and 1 project-based learning high school. In addition, Santa-Monica Malibu USD also offers early childhood education at 11 centers, as well adult education.

Per the Santa Monica-Malibu USD's 2024-25 Local Control and Accountability Plan, the district's ethnic make-up is 48.3% White, 30.2% Hispanic/Latino, 7.1% Asian, 6.9% two or more races, 6.4% African American, 0.7% Filipino, 0.1% American Indian/Alaska Native, and 0.1% Pacific Islander. Further, its students are characterized by several factors: 26.0% of the student population is socioeconomically disadvantaged; 8.0% are English learners; and 0.01% are in foster care placements.

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Study

For a unification, a county committee must determine whether the nine statutory criteria that govern school district reorganizations, as set forth in EC § 35753(a)(1-9), have been substantially met. The nine statutory criteria are as follows:

1. The reorganized districts will be adequate in terms of number of pupils enrolled.
2. The districts are each organized on the basis of a substantial community identity.
3. The proposal will result in an equitable division of property and facilities of the original district or districts.
4. The reorganization of the districts will preserve each affected district's ability to educate students in an integrated environment and will not promote racial or ethnic discrimination or segregation.
5. Any increase in costs to the state as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.
6. The proposed reorganization will continue to promote sound education performance and will not significantly disrupt the educational programs in the districts affected by the proposed reorganization.
7. Any increase in school facilities costs as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.
8. The proposed reorganization is primarily designed for purposes other than to significantly increase property values.
9. The proposed reorganization will continue to promote sound fiscal management and not cause a substantial negative effect on the fiscal status of the proposed district or any existing district affected by the proposed reorganization.

This analysis is not evaluating whether each of the nine criteria have been substantially met. Instead, this analysis is focused on the fiscal impacts of the proposed reorganization as outlined in Criterion Number 9: Effect on Fiscal Status and Management. As it pertains to the remaining criteria, this analysis will discuss how the outcome of each may be impacted by the fiscal realities of a reorganization.

Legal Requirements

The California Education Code governs the process of school district reorganization, including unifications. Commencing with EC § 35500, the code defines the various types of district reorganizations; describes the overall processes to initiate a district reorganization; specifies the duties and responsibilities of the county committee on district reorganization and other relevant public agencies and organizations; prescribes the timelines for public hearings, governing board actions, and voting; specifies the employment rights of district employees; and lists the criteria upon which the SBE must evaluate reorganization proposals.

Unification Initiated by 10% Petition or Local Agency—EC § 35721 specifies three ways in which a unification may be initiated:

- (a) Submittal of a petition signed by at least 10% of the registered voters of the entire school district; or
- (b) Submittal of a petition signed by at least 5% of the registered voters to reorganize a district with over 200,000 average daily attendance (ADA) into two or more districts; or
- (c) Submittal of a resolution approved by a majority of the members of a city council, county board of supervisors, governing board of a special district, or local agency formation commission.

Given these options, the contemplated unification would fall under subsection (c) as a resolution was submitted by the Malibu City Council with all five members in favor.

Public Hearings—Following the determination by the county superintendent of schools that the reorganization petition is sufficient and signed as required by law, the petition is transmitted to the county committee and the SBE. The county committee is then responsible for holding a preliminary hearing and subsequently granting or denying the petition. If the county committee grants the petition, it must adopt a tentative recommendation and then hold one or more public hearings in the area proposed for reorganization no later than 60 days after the committee's adoption of a tentative recommendation.

Various public hearings have been held as the petition has been submitted, placed on hold, and restarted numerous times. Preliminary public hearings were held on April 17, 2021, and September 18, 2021; after which, the petition was moved into the regular review process. However, at the next public meeting, on November 10, 2021, the city of Malibu once again requested that the petition be placed on hold. Additional public hearings have been scheduled for the Los Angeles County Committee to determine whether to grant or deny the petition.

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County Committee on School District Reorganization—Following the public hearings on the reorganization proposal, the county committee is charged with evaluating the reorganization proposal based on the same criteria that would be followed by the SBE. These criteria are specified in EC § 35753 and are often referred to as the “nine reorganization criteria.” Based on this evaluation, the county committee adopts a final recommendation—within 120 days of the first public hearing or within 120 days of compliance with the California Environmental Quality Act (CEQA).

SBE’s Responsibilities—Once it has received the reorganization proposal and recommendation of the county committee, the SBE must hold a public hearing on the proposal. Upon a finding that the proposal substantially meets the state’s nine reorganization criteria, the SBE may approve the reorganization. Current law authorizes the SBE to also consider any other criteria when evaluating the proposal, even though the criteria are not specified in statute (EC § 35753[a][10]).

Further, CEQA requires that the environmental impacts of district reorganizations be evaluated. The California Code of Regulations (CCR), Title 14 Section 15378(b)(5) states that “Organizational or administrative activities of governments that will not result in direct or indirect physical changes in the environment” are not projects under CEQA. That said, in 1982, the State Supreme Court ruled that the reorganization of school district boundaries is within the scope of CEQA; therefore, the proposed reorganization of the Santa Monica-Malibu USD into two unified school districts must also take into consideration any environmental impacts.

An environmental review of the impacts of the reorganization may need to be completed before the SBE may make a decision. SSC staff note that the California Department of Education (CDE), as staff to the SBE, has indicated that the CDE’s ability to fund the CEQA analysis has been constrained as a result of state funding reductions. Therefore, the costs associated with completing CEQA may fall on the agencies pursuing the reorganization.

Election—Per EC § 35722, once the county committee adopts a final recommendation, it will transmit the recommendation together with the resolution approved by the city council to the SBE for its approval (per EC § 35750 et seq.). If approved by the SBE, it will notify the county superintendent who is then required to call an election and prepare a statement of official information and statistics, as well as compile and present arguments for and against the reorganization. The area of election is established by the SBE, with possible input from the county committee. If the SBE disapproves the petition, the process is terminated.

Analysis of Nine Criteria

Criterion Number 1: Adequate Number of Pupils

EC § 35753(a)(1) specifies that the reorganized districts must be adequate in terms of number of pupils enrolled. Section 18573 of Title 5 of the CCR expands on this and stipulates that the projected enrollment should be at least 1,501 pupils for unified school districts, 901 for elementary school districts, and 301 pupils for high school districts, unless unusual circumstances exist. The CCR further specifies that enrollment projections are to be included in the analysis. The intent of this section is to discourage district reorganizations that result in districts that, because of small size and reduced revenues, become more dependent upon the local county office of education or the state for administrative support or funding.

Analysis and Comment

While enrollment and ADA are the main drivers for funding and will impact the ability of each district to offer comprehensive educational programs and conduct other operations, the financial impact from this criterion is moot as the newly created school district (Malibu USD) would be a community-funded district²—producing over three times the revenue per ADA than the statewide average. However, enrollment is projected to be below the 1,501-pupil threshold and statewide pupil enrollment is estimated to decrease an additional 11.3% over the next 10 years, which would likely further impact the enrollment of the proposed Malibu USD.

Criterion Number 2: Community Identity

The Education Code specifies that the districts must be organized on the basis of substantial community identity. The CCR expands on this requirement and states that, to determine whether the new district is organized on the basis of substantial community identity, the following factors should be considered: (1) isolation; (2) geography; (3) distance between social centers; (4) distance between school centers; (5) topography; (6) weather; and (7) community, school, social ties, and other circumstances peculiar to the area.

The CDE further expanded on this criterion in its District Organization Handbook (Handbook), which provides additional considerations to evaluate whether a proposed district reorganization meets the community identity criterion. Some of these considerations include topography and electoral boundaries; usage patterns for parks and school facilities for recreation; traffic patterns

²A community-funded school district is one in which the district's property tax revenue exceeds its Local Control Funding Formula (LCFF) funding level, so that the state provides minimum state aid and Education Protection Account (EPA) funding, and nearly all of its general-purpose funding is generated from local property taxes.

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and public transportation routes; neighborhood and regional shopping patterns; and the architecture, size, and style of homes.

Analysis and Comment

There should be no fiscal impacts on this criterion from the proposed reorganization. That said, both cities are incorporated cities with established identities and, per the resolution, the unincorporated area surrounding the city of Malibu strongly identifies and considers itself, in conjunction with the city of Malibu, a part of the Greater Malibu area.

Criterion Number 3: Equitable Division of Property/Facilities

EC § 35753(a)(3) requires that proposed school district reorganizations result in the equitable divisions of property and facilities. The CCR and the CDE Handbook suggest that an equitable division must include not only facilities, land, and other property, but also debt and monies due but not collected. Further, EC § 35565 states that if a dispute arises concerning the division of funds, property, or obligations, a board of arbitrators shall be appointed to resolve the dispute, or the districts may mutually agree to the appointment of a sole arbitrator by the county superintendent of schools.

This criterion applies when a school district reorganization results in the division of an existing district. The criterion does not apply when whole districts merge.

Analysis and Comment

If the proposed creation of a new unified school district is successful, there would be a transfer of land and facilities from Santa Monica-Malibu USD to the proposed Malibu USD. Therefore, there would have to be an equitable division of property, assets, liabilities, and fund balance reserves between the proposed Malibu USD and remaining Santa Monica USD.

It is important to note that, while the Education Code provides direction on how property, assets, and liabilities should be divided, and the county committee's recommendation, if provided, is given weight, the ultimate decision on the division of property rests solely with the SBE. Therefore, the discussion provided below is based strictly on the Education Code and provided to the Los Angeles County Committee for its consideration should it prepare a recommendation to the SBE.

Division of Property—EC § 35560 provides a general rule to guide how the division of property is to be carried out. Essentially, the Education Code provides that real and personal property situated within the boundaries of a district will be the property of the district in which the real property is located. All other property, funds, and obligations, except bond indebtedness, are to be

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divided pro rata among the districts. The basis for the division and allocation will be the assessed valuation of the part of the original district which is included within each of the districts.

- **Real Property**

EC § 35575 and 35576 distinguish between the annexation of territory containing no public school property or buildings and the annexation of territory that does contain public school property or buildings. In this case, the territory to be transferred clearly contains public school property. As such, per EC § 35576, the proposed Malibu USD would take possession of the school sites on the day that the reorganization becomes effective. The proposed Malibu USD will automatically assume a proportionate share of Santa Monica-Malibu USD's outstanding bonded indebtedness (see **Division of Debt** for more detail).

- **Personal Property**

Personal property of Santa Monica-Malibu USD that is used for district-wide purposes and not located at or designated for use by a specific school site is subject to division of property pursuant to EC § 35560. For example, school buses are used district-wide and would, therefore, be subject to division, while desks at a school site would not. A detailed list of personal property will need to be developed and agreement will need to be reached between the two parties as to its division.

Division of Debt—EC § 35576 states that when property is taken from one district and annexed to another district and the area transferred contains public school property or buildings, the district to which the territory is annexed takes possession of the property, buildings, and equipment on the day when the annexation becomes effective. The total amount of bonds a district is able to sell is determined by the total value of the property within the district's boundaries. In addition, the debt for which each property is liable is tied to the outstanding bonded indebtedness of the district in which it is located. Therefore, when property is taken from one district and annexed to another, the property transferred ceases to be liable for the outstanding bonded indebtedness of the original district and automatically assumes its proportionate share of the outstanding bonded indebtedness of the district to which it is annexed.

However, the new district is required to pay the original district the greater of 1) the proportionate share of the outstanding bonded indebtedness of the original district, which proportionate share will be the ratio of the total assessed valuation of the transferred property to the total assessed valuation of the original district in the year immediately preceding the date on which the transfer is effective; or 2) that portion of the outstanding bonded indebtedness of the original district which was incurred to acquire and improve the school lots or buildings, or fixture located therein, and situated on the transferred property.

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EC § 35738 provides alternative methods of dividing the bonded indebtedness other than that specified above. It provides for consideration of assessed valuation, number of pupils, property values, and other matters which the petitioners or county committee deem pertinent.

Figure 2 displays two bases for allocating assets between the remaining Santa Monica USD and the proposed Malibu USD—enrollment and assessed valuation—both based on fiscal year 2023-24.³ On an enrollment basis, an estimated 1,033 students who attended Santa Monica-Malibu USD would be transferred to the proposed Malibu USD. This represents 12.0% of the Santa Monica-Malibu USD enrollment.

On an assessed valuation basis, property within the proposed Malibu USD boundary is estimated to be valued at \$23.7 billion compared to \$48.1 billion for the remaining Santa Monica USD.⁴ The property in the proposed Malibu USD, therefore, accounts for 33.0% of the assessed valuation of the property of Santa Monica-Malibu USD.⁵

Figure 2: Allocation of Assets—Enrollment and Assessed Valuation Basis

	Enrollment ¹		Estimated Assessed Valuation ²	
Total	8,630		\$71,745,030,845	
District	Value	Percentage	Value	Percentage
Santa Monica USD	7,597	88.0%	\$48,095,362,892	67.0%
Malibu USD	1,033	12.0%	\$23,649,667,953	33.0%

¹2023-24 CDE DataQuest

²2023-24 actual assessed valuation per the “Post Pricing Book for General Obligation Bonds of SFID No. 1 (Santa Monica Schools) Election of 2018, Series C,” dated November 2, 2023

As previously mentioned, Santa Monica-Malibu USD currently owns property within the proposed Malibu USD, which, as noted in EC § 35576, will be transferred as part of the reorganization. Malibu residents are, therefore, required to assume a portion of Santa Monica-Malibu USD’s outstanding bond indebtedness, which is either the greater of the bond indebtedness attributed to the property or the proportionate share of Santa Monica-Malibu USD’s bonded indebtedness. As of June 30, 2024, Santa Monica-Malibu USD had \$1.02 billion in outstanding bonded

³Information was not available regarding the bond indebtedness incurred to acquire and improve school lots or buildings pertinent to the property that will be transferred, therefore, a proposed split on this basis was not calculated.

⁴The “Post Pricing Book for General Obligation Bonds of SFID No. 1 (Santa Monica Schools) Election of 2018, Series C” dated November 2, 2023, includes a projected tax rates table with actual assessed value for 2023-24 and projected values through 2049-50 based on a 4% annual increase. The assessed valuation utilized in this analysis is the actual assessed valuation for 2023-24 for the entire Santa Monica-Malibu USD. The percentage split calculated as part of the original 2022 Study was utilized to determine the noted split between the proposed Malibu USD and the remaining Santa Monica USD.

⁵Does not consider the potential impacts of the recent Palisades or Eaton fires on assessed valuation

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indebtedness, which is a combination of district-wide general obligation bonds and school facilities improvements district (SFIDs) general obligation bonds (GO) (Figure 3). Santa Monica-Malibu USD placed, and voters approved, two SFIDs in 2018—one for \$485 million for schools within Santa Monica and another for \$195 million for schools within Malibu.

Figure 3: GO Bonds

GO	Outstanding Balance	Area Covered
SFID 1	\$418,180,000	Santa Monica
SFID 2	\$90,025,000	Malibu
-	\$513,360,000	Entire district
	\$1,021,565,000	

Source: Santa Monica-Malibu USD Audit Report,
Fiscal Year Ended June 30, 2024

EC § 15300 et seq. allows school districts with community facilities districts (CFDs) to establish SFIDs in order to finance school construction within a portion of the territory of the school district. It is important to note that current state law provides no guidance for transfer of a CFD, or SFID allowed under the statute, among school districts. The CDE Handbook provides little guidance on the processes that should be followed when CFDs are the subject of a reorganization. It notes that, when CFDs are formed, the school district board is usually designated as the board of directors for the CFD. This governance structure, however, can become a problem in the event of a reorganization that includes a CFD. As an example, the CDE Handbook offers a situation in which a high school district operates as the board of directors of a CFD within the high school district boundaries. If a unified school district is formed along these same boundaries, “legal steps must be taken to change the board of directors of the CFD from the high school district board to a newly formed unified school district board.” The CDE Handbook goes on to advise that bond counsel be consulted to make any necessary changes to the conditions prescribed in the CFD’s organization and bond documents and that “in some cases, legislation may be necessary.”

As it pertains to bonded indebtedness, however, GO bonds issued for a SFID are nearly identical to those issued on a district-wide basis and would therefore be treated in a similar manner. The difference being that as SFIDs are created to align funding in specific areas of the district, they would limit the respective residents’ tax liability to improvements being completed within their SFIDs. Therefore, the proposed Malibu USD would be responsible for its proportionate share of the district-wide GO bond—either \$61.4 million as calculated on an enrollment basis or \$169.2 million on an assessed valuation basis on (Figure 4)—as well as the GO bonds attributed to SFID 2, for a total of either \$151.5 million or \$259.2 million, respectively.

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Figure 4: Allocation of Outstanding District-Wide Bond Indebtedness

	Santa Monica-Malibu USD ¹	Allocation to Malibu USD	
		By Enrollment (12.0%)	By Assessed Valuation (33.0%)
Bonded Indebtedness	\$513,360,000	\$61,448,538	\$169,221,386

¹District-wide bonded indebtedness, excluding SFIDs

The reorganization proposal and the new outstanding bond indebtedness should have no effect on the amount due by property owners, as the property owners within the proposed Malibu USD's boundaries are already paying debt service on Santa Monica-Malibu USD bonds. They should see no net change in payments due on outstanding GO bonds as a result of the reorganization. However, should the proposed Malibu USD voters choose to approve local debt to match the Santa Monica-Malibu USD previously approved funding levels, there may be additional obligations for new GO bonds and/or parcel taxes.

As previously noted, upon unification, the property being transferred will cease to be liable for the outstanding bond indebtedness of Santa Monica-Malibu USD. EC § 35572 places a restriction on the transfer of territory from one school district to another. The code states that no territory can be taken from a school district having outstanding bond indebtedness if the taking would reduce the last equalized assessed valuation so that the outstanding bond indebtedness would exceed 5% of the assessed valuation remaining in the district on the date the reorganization is effective. As shown in Figure 5, the current bond indebtedness represents 1.42% of the current assessed value and would increase to 2.12% with the transfer of property to the proposed Malibu USD—well below the 5% threshold.

Figure 5: Bond Indebtedness as a Percent of Assessed Value

Santa Monica-Malibu USD		
Bond Indebtedness		\$1,021,565,000
	Estimated Assessed Value	Bond Indebtedness as a Percent of Assessed Value
Santa Monica-Malibu USD	\$71,745,030,845	1.42%
Remaining Santa Monica USD	\$48,095,362,892	2.12%

Lastly, Santa Monica-Malibu USD at any given time has unspent bond proceeds in its building fund(s). Per EC § 35560(a)(2), bond proceeds are funds that are subject to a pro rata division between the districts. The proposed Malibu USD is entitled to a portion of such unspent bond proceeds for use within the new unified district. Further, EC § 35561 states that funds derived from the sale of bonds issued by the former district must be used “for the purposes for which the bonds were originally voted.” Therefore, the use of such funds received by the proposed Malibu USD

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would be restricted to projects consistent with the measure approved by Santa Monica-Malibu USD voters.

Division of Fund Balance Reserves and Liabilities—Santa Monica-Malibu USD’s fund balance reserves, both restricted and unrestricted, and liabilities would be subject to division. The basis for the division would be either proportional ADA or assessed valuation. A reasonable basis upon which to divide fund balance reserves would be in accordance with how the funds were generated. For example, the capital project reserves should be divided based on proportional assessed valuation, while the General Fund unrestricted reserves and liabilities likely should be divided based on proportional ADA. That said, as both districts are community funded, it might be more appropriate to divide General Fund unrestricted reserves and liabilities by assessed valuation, similar to the division of debt. Special allocations may be made for other funds. For instance, developer fee funds might be allocated based on where the levied property was located, while categorical funds might be allocated based on the location, enrollment, or ADA that generated those funds.

Division of Student Funds and Scholarships—All student funds and those scholarship funds not restricted to a specific school site would be divided based on proportional enrollment. District-wide property is usually divided pro rata, on the basis of assessed value in each district. In most cases, however, ADA is used as the basis for the division of non-real estate assets. Student funds are also generally divided on the basis of location but may be further prorated by students. The division of non-real estate assets and student funds would be divided by ADA for those currently enrolled students within the four schools and will transfer to the proposed Malibu USD.

Postretirement Benefits—EC § 35556 states that, when a portion of the territory of a school district becomes part of another district, the employees assigned to perform their duties in the affected territory shall become employees of the acquiring district. (Please note that, while the Education Code presumes employees currently assigned to the four schools subject to this unification will automatically become employees of the proposed Malibu USD, seniority rights and other provisions of Santa Monica-Malibu USD’s existing collective bargaining agreements could alter the specific individuals that will transfer to the proposed Malibu USD.)

The proposed Malibu USD is responsible for its proportionate share of historic other post-employment benefits and compensated absences offered by Santa Monica-Malibu USD, as employees of Santa Monica-Malibu USD will be employees of the proposed Malibu USD should the reorganization proceed. Proportional full-time equivalents employed, ADA, or enrollment might be a reasonable basis for division. Benefits to retirees, as of the date of the proposed unification, would not be affected by the reorganization. Costs for future retiree benefits would be borne solely by the respective new employer and the proposed Malibu USD could negotiate different benefit packages.

This criterion is likely the most critical given the assets noted that would need to be divided. This has also been one of the main points of contention between the two parties over the years. It is likely that—as called for in the Education Code—should the Los Angeles County Committee vote to approve the proposed reorganization, an arbitrator or board of arbitrators will need to be convened to arrive at an equitable division of property.

Criterion Number 4: Discrimination/Segregation

The Education Code requires that proposed reorganizations preserve the districts’ ability to educate students in an integrated environment and “not promote racial or ethnic discrimination or segregation.” Title 5 regulations provide further guidance, calling for an assessment of (1) the relative proportions of the racial and ethnic groups in the district(s), (2) the growth rates of these populations, (3) the school board policies to address racial and ethnic segregation and discrimination, and (4) the location and traffic patterns among schools that could affect efforts to integrate affected schools.

In addition, the CDE Handbook describes segregation as a condition in which a disproportionate percentage of minority students in a district or affected school(s) occurs as a result of a proposal, making it unrealistic to provide integrated educational experiences. It further states that “any change that significantly increases the percentage of minority group students could be the controlling factor in the determination of a promotion of segregation.”

Analysis and Comment

With a state-funded district, the demographic make-up of a district impacts the revenues received by the district and its ability to offer comprehensive educational programs and conduct other operations. However, as both the proposed Malibu USD and the remaining Santa Monica USD would be community funded districts, the demographic makeup has no fiscal impact, though it will impact the programs provided as each district would still need to meet its respective minimum proportionality percentage (MPP).⁶ Even though this will have no fiscal impact, as this information is utilized to arrive at the unduplicated pupil percentage (UPP), which accounts for students that are identified as English learners, eligible for free or reduced-price meals, or foster youth, and is used in this report when completing the fiscal analysis, the following information is being provided.

Using 2021-22, 2022-23, and 2023-24 student demographic information provided in state-certified data, Santa Monica-Malibu USD had a UPP of 29.50% (three-year average) in 2023-24. Utilizing these same years, the remaining Santa Monica USD would have had a UPP of 29.97%, while the

⁶Percentage by which services must be proportionally increased or improved for unduplicated students above services provided to all students

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proposed Malibu USD would have had a UPP of 18.10%. Using the enrollment projected for 2024-25 and 2025-26, as well as projected unduplicated pupil counts based on prior-year trends, and assuming for illustrative purposes that the reorganization is effective in 2025-26, the UPP for both districts would increase—the remaining Santa Monica USD would have a UPP of 33.73% in 2025-26, while the proposed Malibu USD would have a UPP of 19.00%.⁷ To the extent that each school district is required to spend supplemental grant dollars generated in proportion to its UPP, the expenditure requirement would increase for the remaining Santa Monica USD from the current per student average.

Criterion Number 5: No Substantial Increase in State Costs

EC § 35753(a)(5) specifies that “any increase in costs to the state as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.”

Analysis and Comment

In 2013-14, the state enacted an historic reform of its school finance system. In the early 1970s, in response to the California State Supreme Court’s decision in the *Serrano v. Priest* case, the Legislature enacted a system of general-purpose funding under revenue limits and need-based or program-based funding established through numerous categorical programs. Over time, per-pupil differences in general purpose funding have been narrowed considerably through the revenue limit system; however, funding differences related to categorical programs remained.

As part of the 2013 State Budget Act, the Legislature passed the LCFF. This historic reform of the state’s school finance system eliminated revenue limits and more than 40 categorical programs. In its place, the state established a system of funding local educational agencies (LEAs) through base grants, add-on funding for K-3 class-size reduction and career technical education, and supplemental and concentration grants to provide extra funding to districts with students from low-income families, students who are English learners, and foster youth.

The model itself was enacted in June 2013 with the signing of Assembly Bill (AB) 97 (Chapter 47/2013), and revisions and clarifications were enacted in September 2013 through Senate Bill 97 (Chapter 357/2013)—the “clean-up” measure to AB 97. The revenue analysis for the proposed district reorganization, therefore, reflects the LCFF system.

⁷Per EC § 35735.1, the UPP reflected for the proposed Malibu USD is based on a single year (2025-26) of unduplicated pupil and enrollment counts—the first year of operation. The UPP reflected for the remaining Santa Monica USD is calculated based on a three-year rolling average including the former district’s—Santa Monica-Malibu USD—prior-year and second prior-year unduplicated pupil and enrollment counts, as well as the unduplicated pupil and enrollment counts for the first year of operation. Therefore, the remaining Santa Monica USD’s UPP has been calculated using the former district’s unduplicated pupil and enrollment counts for 2023-24 and 2024-25 plus those of just the schools that will be part of the remaining Santa Monica USD for 2025-26.

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The state, under the minimum guarantee established by Proposition 98, allocates funding to the K-14 community on an annual basis, which is split between K-12 and community colleges at an approximate rate of 89% and 11%, respectively. The 2025-26 proposed State Budget estimates the minimum guarantee to be \$118.9 billion, with approximately \$103.4 billion allocated for K-12 schools. Of the \$103.4 billion, \$79.9 billion is earmarked to be distributed through the LCFF.

The LCFF for each LEA is calculated based on a number of factors including ADA, UPP, and property taxes. Currently, Santa Monica-Malibu USD is a community-funded district.⁸ And based on the analysis completed for Criterion Number 9, both the remaining Santa Monica USD and the proposed Malibu USD would remain community-funded school districts post reorganization for the immediate future. The financial effect of growth or decline in student enrollment on revenues per pupil in a community-funded school district are different, and opposite, from those of state-funded school districts. State-funded school districts receive additional funding for each additional student in attendance and, conversely, can lose funding when student enrollments decline. In contrast, the local tax revenues that are the primary support for community-funded school districts are not affected by student enrollment. For community-funded school districts, higher enrollments result in lower average per-pupil funding and lower enrollments increase average funding per pupil. In addition, community-funded status results in reduced costs to the state as the majority of funding is provided by local property taxes.

Criterion Number 6: Sound Educational Program

The Education Code specifies that “the proposed reorganization will continue to promote sound education performance and will not significantly disrupt the educational programs in the districts affected by the proposed reorganization.” Title 5 regulations further specify a duty of the CDE to describe district-wide and school site programs, in school sites excluded from the reorganization proposal, that could be adversely affected by a district reorganization.

Analysis and Comment

As previously noted, the ability of each district to provide sound and comprehensive educational programs is directly impacted by their fiscal resources and practices. However, the analysis for this criterion looks to an examination of the educational programs based on programs offered, and their distribution across school sites. In addition, it asks that an examination be conducted to determine whether the reorganization will continue to promote sound education performance, which can be completed by reviewing data from sources such as the California School Dashboard and results on the California Assessment of Student Performance and Progress. There is no fiscal analysis that would need to be completed to address this criterion.

⁸Santa Monica-Malibu USD became a community-funded district for the first time in 2018-19.

Criterion Number 7: No Substantial Increase to School Facilities Costs

The Education Code specifies that “any increase in school facilities costs as a result of the proposed reorganization will be insignificant and otherwise incidental to the reorganization.” There are no accompanying Title 5 regulations that provide further definition or guidance for this criterion.

Analysis and Comment

The criteria for district reorganization require an analysis to determine if there will be any increase in school facilities costs as a result of the proposed reorganization and whether the costs will be insignificant and otherwise incidental to the reorganization. This analysis would take into consideration both current and projected enrollment as well as the current available and planned capacity of the facilities. Should either the remaining Santa Monica USD or the proposed Malibu USD have more students currently attending within their respective boundaries, or projected to attend, than available capacity to house those students, then either new facilities, or facilities modified to increase capacity, would be required, which would result in increased costs.

If new or modified facilities are necessary, the districts would likely fund any construction through a combination of local and state bond dollars, as well as developer fees and other local sources. As it pertains to the state bond dollars, the funding would be received through the state’s School Facility Program. The most recent state facilities bond was approved by voters in November of 2024 and included significant changes to the School Facility Program. The districts’ eligibility for these bond funds will be dependent on the eligibility requirements of the program, which are currently being discussed and regulations developed.

Ultimately, the criterion would need to determine whether the construction of new facilities or the modification of existing facilities to accommodate students, which would constitute a significant expense, is a direct result of the reorganization. Conservative and more aggressive enrollment projections for the remaining Santa Monica USD and the proposed Malibu USD schools show expected decline of students into the foreseeable future, making a substantial increase in facilities cost as a result of the reorganization unlikely.

Criterion Number 8: Increased Property Values

EC § 35753(a)(8) specifies that “the proposed reorganization is primarily designed for purposes other than to significantly increase property values.”

The CDE Handbook further suggests that the county committee should analyze the petition for reorganization to see if the rationale for the reorganization appears “questionable or not compelling.” If the rationale does not appear compelling, the Handbook suggests that the committee “should at least consider whether increased property values might be the primary reason

for the petition,” and further suggests that the county tax assessor or local real estate firms be consulted for advice on whether a proposed transfer would affect property values.

Analysis and Comment

This criterion requires that a determination be made as to whether an increase in property values is the purpose of the reorganization, which is not a fiscal matter. That said, property values are inherently a fiscal matter that, for community-funded districts, directly impacts the funding available to districts. For the Los Angeles County Committee’s consideration, it is unlikely that the reorganization would increase property values in either city or the unincorporated area encompassed by Santa Monica-Malibu USD as they are both existing, established communities. Though, as discussed in detail in Criterion Number 9, it is clear that the reorganization will affect the split of property taxes between the remaining Santa Monica USD and the proposed Malibu USD.

Criterion Number 9: Effect on Fiscal Status and Management

The Education Code specifies that the proposed reorganization “will continue to promote sound fiscal management and not cause a substantial negative effect on the fiscal status of the proposed district or any existing district affected by the proposed reorganization.”

Analysis and Comment

This section reviews the fiscal effects of establishing the proposed Malibu USD from Santa Monica-Malibu USD. It begins with an examination of Santa Monica-Malibu USD’s budget over the current year and the prior two years, noting trends in revenues and expenditures and highlighting issues that could be of fiscal concern in the future. This review is followed by an analysis of the fiscal effects of establishing the proposed Malibu USD, commencing in 2025-26. While this is an aggressive timeline and the processes inherent with a reorganization of this magnitude ensures that implementation could not happen by this date, the 2025-26 fiscal year is considered in Santa Monica-Malibu USD’s multiyear projections and, therefore, provides a reasonable point from which to evaluate the effects of the reorganization proposal.

Santa Monica-Malibu USD’s Current Budget and Multiyear Projections

Figure 6 displays Santa Monica-Malibu USD’s General Fund revenues, expenses, and fund balance for the current year, based on its 2024-25 First Interim Report, against the 2022-23 and 2023-24 unaudited actuals.

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Figure 6: Santa Monica-Malibu USD General Fund Budget Summary (Unrestricted and Restricted Funds)

	2022-23 Audited Actuals	2023-24 Unaudited Actuals	2024-25 First Interim Report	Change from 2022-23	
				Amount	Percent
Revenues					
LCFF Revenues	\$120,539,584	\$127,495,999	\$128,387,384	\$7,847,800	6.51%
Federal Revenues	\$7,885,897	\$5,465,309	\$7,614,360	(\$271,537)	-3.44%
Other State Revenues	\$19,466,706	\$5,323,064	\$10,047,971	(\$9,418,735)	-48.38%
Other Local Revenues	\$67,201,194	\$77,053,675	\$72,271,377	\$5,070,183	7.54%
Total Revenues	\$215,093,381	\$215,338,048	\$218,321,092	\$3,227,711	1.50%
Expenditures					
Certificated Salaries	\$77,687,545	\$69,081,633	\$81,707,952	\$4,020,407	5.18%
Classified Salaries	\$39,414,623	\$35,781,526	\$43,540,638	\$4,126,015	10.47%
Employee Benefits	\$57,302,037	\$46,118,493	\$59,177,805	\$1,875,768	3.27%
Books and Supplies	\$5,493,387	\$4,856,800	\$11,972,982	\$6,479,595	117.95%
Service/Other Operating Expenses	\$28,351,421	\$32,023,433	\$33,314,935	\$4,963,514	17.51%
Capital Expenses	\$1,354,551	\$1,118,825	\$1,131,697	(\$222,854)	-16.45%
Other Outgo Expense	\$617,036	\$3,619,678	\$90,000	(\$527,036)	-85.41%
Direct Support/ Indirect Costs	(\$629,335)	(\$693,568)	(\$790,580)	(\$161,245)	25.62%
Total Expenditures	\$209,591,265	\$191,906,818	\$230,145,429	\$20,554,164	9.81%
Excess/Deficiency	\$5,502,117	\$23,431,229	(\$11,824,337)		
Other Financing Sources/Uses					
Transfers In	\$438,501	\$0	\$0	(\$438,501)	-100.00%
Transfers Out	(\$2,638,501)	(\$2,600,000)	(\$3,375,000)	(\$736,499)	27.91%
Other Sources	\$949,847	\$0	\$0	(\$949,847)	-100.00%
Other Uses	\$0	\$0	\$0	\$0	N/A
Contributions	\$0	\$0	\$0	\$0	N/A
Total, Other Financing Sources/Uses	(\$1,250,153)	(\$2,600,000)	(\$3,375,000)	(\$2,124,847)	169.97%
Fund Balance Change	\$4,251,964	\$20,831,229	(\$15,199,337)		
Reserves					
Beginning Fund Balance	\$54,985,196	\$59,237,160	\$72,765,062	\$17,779,866	32.34%
Audit Adjustments	\$0	(\$7,303,327)	\$0	\$0	N/A
Other Restatements	\$0	\$0	\$0	\$0	N/A
Adjusted Beginning Balance	\$54,985,196	\$51,933,833	\$72,765,062	\$17,779,866	32.34%
Ending Balance	\$59,237,160	\$72,765,062	\$57,565,725	(\$1,671,435)	-2.82%

Source: Santa Monica-Malibu USD-provided data

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The figure shows that, for 2024-25, Santa Monica-Malibu USD has budgeted revenues of \$218.3 million, an increase of 1.50% from the 2022-23 fiscal year. Expenditures are budgeted at \$230.1 million, an increase of 9.81% from 2022-23. As a result, Santa Monica-Malibu USD anticipates deficit spending (i.e., more expenditures than revenues) by \$11.8 million. Combined with other transfers out and contributions (e.g., contributions to special education, the cafeteria fund, etc.), it expects a total reduction in its fund balance of \$15.2 million. This deficiency notwithstanding, Santa Monica-Malibu USD expects to end the current fiscal year with an ending fund balance of \$57.6 million—of which \$17.8 million is restricted, leaving an ending balance of \$32.7 million (equivalent to 14.2% of budgeted expenditures).

Santa Monica-Malibu USD’s ending fund balance, which reached \$72.8 million at the close of the 2023-24 fiscal year, allows it to deficit spend in 2024-25. In 2020-21 and 2021-22, it received substantial one-time state and federal funds to support the safe reopening of schools, and to address learning loss, which in turn has supported its ending fund balance. However, continued deficit spending at 2024-25 levels is unsustainable.

Figure 7 displays Santa Monica-Malibu USD’s multiyear projections for the General Fund (both unrestricted and restricted funds) from 2024-25 through 2026-27. This figure shows total revenues for Santa Monica-Malibu USD increasing in 2025-26 by 1.34% and again in 2026-27 by 0.47%. Expenditures, on the other hand, are expected to be reduced as of the 2024-25 First Interim report with a significantly smaller amount of deficit spending in 2025-26 and a small surplus in 2026-27. If Santa Monica-Malibu USD can maintain its current course and eliminate its deficit spending, it will remain on solid fiscal footing.

Figure 7: Santa Monica-Malibu USD Multiyear Projections (Unrestricted and Restricted Funds)

	Projections				
	2024-25 First Interim	2025-26	% Change from 2024-25	2026-27	% Change from 2025-26
Revenues					
LCFF Revenues	\$128,387,384	\$133,200,155	3.75%	\$138,260,870	3.80%
Federal Revenues	\$7,614,360	\$6,814,360	-10.51%	\$5,549,200	-18.57%
Other State Revenues	\$10,047,971	\$10,811,886	7.60%	\$8,309,225	-23.15%
Other Local Revenues	\$72,271,377	\$70,413,593	-2.57%	\$70,164,731	-0.35%
Total Revenues	\$218,321,092	\$221,239,994	1.34%	\$222,284,026	0.47%
Expenditures					
Certificated	\$81,707,952	\$84,550,555	3.48%	\$84,318,814	-0.27%
Classified	\$43,540,638	\$45,903,435	5.43%	\$46,591,987	1.50%
Employee Benefits	\$59,177,805	\$61,612,308	4.11%	\$62,686,124	1.74%
Books and Supplies	\$11,972,982	\$6,825,825	-42.99%	\$5,297,314	-22.39%
Services/Other Operating Expenses	\$33,314,935	\$21,117,636	-36.61%	\$20,123,260	-4.71%

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	Projections				
	2024-25 First Interim	2025-26	% Change from 2024-25	2026-27	% Change from 2025-26
Capital Expenses	\$1,131,697	\$165,000	-85.42%	\$165,000	0.00%
Other Outgo Expense	\$90,000	\$120,000	33.33%	\$120,000	0.00%
Direct Support/Indirect Costs	(\$790,580)	(\$721,762)	-8.70%	(\$1,067,298)	47.87%
Transfers Out	\$3,375,000	\$3,850,000	14.07%	\$3,850,000	0.00%
Other Adjustments (Solvency Plan)	\$0	\$0	N/A	\$0	N/A
Total Expenditures	\$233,520,429	\$223,422,997	-4.32%	\$222,085,201	-0.60%
Fund Balance Change	(\$15,199,337)	(\$2,183,003)		\$198,825	
Reserves					
Beginning Fund Balance	\$72,765,062	\$57,565,725	-20.89%	\$55,382,722	-3.79%
Ending Fund Balance	\$57,565,725	\$55,382,722	-3.79%	\$55,581,547	0.36%

Source: Santa Monica-Malibu USD-provided data

Proposed Reorganization

The LCFF provides LEAs in California the majority of their general-purpose revenues. As discussed previously, the state replaced the revenue limit funding model with the LCFF commencing in 2013-14. This funding model provides a minimum level of funding and calculates revenues for LEAs based on student attendance in four grade spans, as well as the LEA's unduplicated count of students who are from low-income families, English learners, or foster youth (UPP).

Figure 8 estimates the LCFF revenue for the proposed Malibu USD and the remaining Santa Monica USD following reorganization, assuming implementation in 2025-26. The figure displays:

1. The ADA for each district by grade span projected by utilizing enrollment and enrollment-to-ADA ratios included in the 2024-25 First Interim multiyear projections;
2. the LCFF funding levels (base grant, supplemental grant, concentration grant, and add-ons such as transportation, transitional kindergarten, and Targeted Instructional Improvement Grants, based on the cost-of-living adjustment estimated in the 2025-26 Governor's Budget);
3. minimum state aid (MSA);
4. local revenue/property tax;
5. excess revenue over the LCFF entitlement after MSA is subtracted;
6. EPA; and

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- the LCFF funding amount for 2025-26 per ADA with the calculated UPP for each newly created districts and the current district pre-reorganization.

The figure shows that the proposed Malibu USD's LCFF entitlement would be \$11.8 million, while its projected total LCFF funding (i.e., property tax, EPA, and MSA) would be \$40.6 million in the first year of the reorganization. This is approximately \$42,025 per ADA. The remaining Santa Monica USD's LCFF entitlement would be \$89.0 million, while its projected total LCFF funding would be \$92.3 million, or \$13,005 per ADA (less than the current statewide average of \$13,964).

Part of the reason for the remaining Santa Monica USD's funding level is the treatment of MSA when school districts go through a reorganization. Per the Education Code, Santa Monica USD is the "remaining portion" of Santa Monica-Malibu USD and would keep the categorical portion of the MSA calculation pursuant to EC § 35735.2(c)(1), while the proposed Malibu USD would not retain any categorical MSA. Both districts, though, would still be eligible for MSA under the revenue limit (RL) MSA calculation pursuant to EC § 42238.03(e)(1)(A). The RL rates in these calculations for the new and remaining portions of the district would be identical to that of Santa Monica-Malibu USD, which is currently \$0.⁹

As noted previously in the discussion regarding Criterion Number 5, the proposed Malibu USD's per-ADA funding is considerably higher than the rate of the remaining Santa Monica USD, though both districts would remain community funded districts after reorganization based on current assumptions.

Figure 8: Projected LCFF Revenues (Estimate for 2025-26)

	Malibu USD	Santa Monica USD
2025-26 Grade Span ADA¹		
TK-3	254.58	1,929.82
4-6	212.39	1,583.78
7-8	155.28	1,130.66
9-12	344.97	2,451.00
Total ADA	967.22	7,095.27
LCFF		
Base Grant	\$11,169,234	\$81,802,317
Supplemental Grant	\$424,377	\$5,518,022
Concentration Grant	\$0	\$0
Add-Ons	\$232,839	\$1,715,040
Total LCFF Entitlement	\$11,826,450	\$89,035,380

⁹For most districts, the RL portion of MSA does not generate additional funding. Unlike categorical MSA, RL MSA is offset by local revenue and EPA funding.

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	Malibu USD	Santa Monica USD
Funding Sources		
MSA	\$0	\$8,585,843
Total LCFF Less MSA	\$11,826,450	\$80,449,537
Local Revenue/Property Tax	\$40,454,236	\$82,270,126
<i>Excess Revenue Over LCFF</i>	<i>\$28,627,786</i>	<i>\$1,820,589</i>
Education Protection Account	\$193,445	\$1,419,053
Total Funding		
Total Funded LCFF	\$40,647,680	\$92,275,022
Total Funded LCFF per ADA	\$42,025	\$13,005
UPP	19.00%	33.73%
Santa Monica-Malibu USD LCFF/UPP—Without Reorganization	\$16,487	33.16%

¹Three prior-year average ADA per EC § 42238.05(a)(1)

Santa Monica-Malibu USD has a 1.33 coverage ratio of property tax/total LCFF less 2012-13 MSA, which shows the extent to which property tax revenues exceed the LCFF entitlement. Higher coverage expresses the depth to which an LEA is a community-funded district. Examination of the remaining Santa Monica USD, without the benefit of the property taxes from the city of Malibu, shows that the coverage ratio drops to 1.02, trending toward state aid status. Admittedly, transitioning from community funded to state aid is not likely and would take several years of growth in LCFF funding that outpaces the growth in property taxes in Santa Monica, but it remains a possibility.

Santa Monica-Malibu USD had a UPP of 29.50% in 2023-24. Reorganization would require that the UPP for each new district be recalculated. As previously noted, using state-certified data from 2023-24 and projections for 2024-25 and 2025-26, the proposed Malibu USD's UPP would be 19.00% versus 33.73% for the remaining Santa Monica USD.

As a matter of state policy, the LCFF provides additional funds to districts with a greater proportion of students in the targeted groups (low socio-economic, English learner, and foster youth)—accounted for in the UPP calculation. While community-funded school districts do not receive state funds to serve unduplicated pupils, they are required to use the calculated value of the supplemental and concentration grants to increase or improve services and student outcomes from local property tax revenues (i.e., MPP).

This creates an unfunded state requirement of property tax dollars proportionate to the UPP of each district. The value of property taxes that the proposed Malibu USD and the remaining Santa Monica USD would be required to carve out from local property taxes to meet this obligation is \$424,377 and \$5.5 million, respectively. The difference is stark, but given the size difference, a

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better comparison would be on a per-ADA basis, in which case, the amount the proposed Malibu USD would be required to utilize for these purposes would be \$438.76 per ADA, while the remaining Santa Monica USD would be \$777.70 per ADA. In this case, the proposed Malibu USD receives substantially more revenue per ADA but has the smaller requirement to meet under the LCFF. To provide context, the current Santa Monica-Malibu USD is projecting a total of approximately \$6.2 million, or \$764.83 per ADA, be set aside for meeting this obligation.

The results of the LCFF analysis are incorporated into the budget projections for 2025-26 for the two districts. These results are displayed in Figure 9. The sum of each revenue—with the exception of LCFF revenue, expense, and fund balance category for the proposed Malibu USD and the remaining Santa Monica USD are derived from the 2024-25 First Interim report estimated balances. LCFF revenue was assumed to match the projections shown in Figure 8. Expenditures have been prorated and assigned on a per-student basis whereby 11.95% of the student population would reside in the proposed Malibu USD and 88.05% would remain with Santa Monica USD.

Figure 9 shows that the proposed Malibu USD would receive total revenues of approximately \$45.9 million in 2025-26. This revenue level assumes the LCFF funding displayed in Figure 8. The proposed Malibu USD would also receive a proportionate share of Santa Monica-Malibu USD's revenues from other sources—with the exception of those exclusive to Santa Monica USD (e.g., Santa Monica sales tax and parcel taxes). Federal and state revenues would be split based on the proposed Malibu USD's proportionate share of ADA, while local revenues would be split based on its proportionate share of property tax revenue and/or location of revenue in 2025-26.

Figure 9: 2025-26 Projected General Fund Budget Summary (Unrestricted and Restricted Funds)

	Malibu USD	Santa Monica USD
Revenues		
LCFF Revenues ¹	\$40,647,680	\$92,275,022
Federal Revenues	\$814,552	\$5,999,808
Other State Revenues	\$1,292,394	\$9,519,492
Other Local Revenues ²	\$3,132,877	\$63,042,929
Total Revenues	\$45,887,503	\$170,837,251
Expenditures		
Certificated Salaries	\$10,106,714	\$74,443,841
Classified Salaries	\$5,487,047	\$40,416,388
Employee Benefits	\$7,364,801	\$54,247,507
Books and Supplies	\$815,922	\$6,009,903
Service/Other Operating Expense	\$2,524,287	\$18,593,349
Capital Expenses	\$19,723	\$145,277
Other Outgo Expense	\$14,344	\$105,656

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	Malibu USD	Santa Monica USD
Direct Support/Indirect Costs	(\$86,276)	(\$635,486)
Total, Other Financing Sources/Uses	\$460,208	\$3,389,792
Total Expenditures	\$26,706,771	\$196,716,226
Fund Balance Change	\$19,180,732	(\$25,878,975)
Reserves		
Beginning Fund Balance	\$6,881,094	\$50,684,631
Ending Fund Balance	\$26,061,826	\$24,805,656

¹Adjusted to reflect LCFF revenues post reorganization as displayed in Figure 8

²Deducts proposed Malibu USD proportionate share of Measure R parcel tax revenues (explained in more detail later in this report)

Similarly, expenditures for the proposed Malibu USD are based on a proportionate share of Santa Monica-Malibu USD's expenditures, which 2025-26 projected expenditures would be approximately \$26.7 million.¹⁰ Under these assumptions, the proposed Malibu USD would experience an increase in its fund balance of \$19.2 million, resulting in an ending fund balance in its first year of operation of approximately \$26.1 million.

Santa Monica USD would experience a significant reduction in LCFF revenues compared to the amount projected to be received in 2024-25 and this loss would be proportionately more than Santa Monica-Malibu USD's loss of ADA to the proposed Malibu USD. Specifically, Santa Monica-Malibu USD's LCFF revenue decline would be approximately 26.77%,¹¹ while its loss in ADA to the proposed Malibu USD would be approximately 11.95%. The reason that Santa Monica-Malibu USD's revenue loss is higher is that the per-pupil property tax revenue in Malibu is higher.

Figure 9 demonstrates the catastrophic impact of a 26.77% LCFF revenue drop resulting from reorganization on the remaining Santa Monica USD. The remaining Santa Monica USD would lose \$24.7 million dollars, which is less—due to the allocation of other revenues and expenditures—than the LCFF shortfall created for the remaining Santa Monica USD shown in Figure 10.

¹⁰SSC was not provided, and is not aware of, the development of operational assumptions by the proposed Malibu USD. Therefore, no adjustments were made to the expense structure, and it was calculated simply on a proportionate share.

¹¹As shown in Figure 8, the funded LCFF per-ADA amount for the proposed Malibu USD and the remaining Santa Monica USD for 2025-26 at \$42,025 and \$13,005, respectively. As a combined unified district, the LCFF revenues are projected to be \$16,487 per ADA. Subtracting the new lower LCFF revenues for the remaining Santa Monica USD of \$13,005 from the LCFF revenues of the unified district sans reorganization of \$16,487 finds that the remaining Santa Monica USD would experience a 26.77% drop in LCFF revenues on a per-ADA basis.

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Figure 10: Estimated 2025-26 LCFF Revenue Loss

	Malibu USD	Santa Monica USD
Total ADA	967.22	7,095.27
Funded LCFF per ADA	\$42,025	\$13,005
Santa Monica-Malibu USD LCFF (per ADA)— Without Reorganization	\$16,487	
Lost Revenue—Remaining Santa Monica USD		(\$24,701,494)

To be clear, while the other revenues help blunt the impact of the loss of LCFF revenues, the other revenues would not be an offset to the loss of LCFF revenues as they are not “additional revenue” beyond which the students in Santa Monica-Malibu USD (and both proposed districts) are already benefiting. Figure 11 shows that even when considering total revenues, the remaining Santa Monica USD would experience a total revenue loss of \$23.9 million (or \$3,363 per ADA). Maintaining the current cost structure on a per-student basis would require Santa Monica USD to spend almost half its unrestricted General Fund reserves in just the first year alone.

Figure 11: Estimated 2025-26 Total General Fund Revenue Loss

	Malibu USD	Santa Monica USD
Total ADA	967.22	7,095.27
Total Revenues per ADA	\$47,443	\$24,078
Santa Monica-Malibu USD General Fund (per ADA)— Without Reorganization	\$27,441	
Lost Revenue—Remaining Santa Monica USD		(\$23,861,496)

Lastly, SSC staff understand that an area that has been subject to some discussion is the allocation of Other Local Revenues. This line item in Figure 9 includes parcel taxes, sales taxes, joint use agreements, donations, leases, and interest revenues. Most revenues could reasonably be allocated based on the location of the activity or the location of the revenue generated. Other revenues could be allocated on a per-pupil basis or as a percentage of revenues generated by agency. However, it is not as simple with the allocation of parcel tax revenues generated by Measure R. Since statutes are silent on how a parcel tax is handled in a district reorganization, there is no definitive answer as to if and how these revenues can be split between the two districts. While SSC staff recommend that direction from legal counsel be obtained should the reorganization be approved, past practice may provide a lens from which to evaluate the likely financial impact of the treatment of parcel taxes.

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Past practice has been that whenever territory transferred from District A—which had a parcel tax—to District B, the territory ceased being responsible for the parcel tax of District A. If District B had a parcel tax, then the transferred territory assumed responsibility for the parcel tax of District B. Moreover, District A retained its parcel tax for the remaining parcels within its boundary.

Based on this past practice, should the reorganization be approved, Santa Monica-Malibu USD would continue to exist (though it is assumed throughout this report that the name would change to Santa Monica USD). Therefore, it would be reasonable to assume that the remaining Santa Monica USD would retain its parcel tax and parcels within the boundary of the now smaller district would continue to be assessed the parcel tax. The proposed Malibu USD, however, would have no parcel tax. Therefore, parcels within its boundary would not be assessed a parcel tax unless and until two-thirds of this new district’s voters approve a new parcel tax.

As such, Figure 12 shows the split and allocation basis for each revenue stream included in Other Local Revenue in Figure 9.

Figure 12: 2022–23 Allocation of Other Local Revenues (Unrestricted and Restricted Funds)

Other Local Revenues	Malibu USD	Santa Monica USD	Total	Allocation Basis
Measure 'R'—Parcel Tax ¹	\$0	\$10,063,834	\$10,063,834	Location
Measure 'Y' and 'GSH'—City of Santa Monica	\$0	\$18,000,000	\$18,000,000	Location
Joint Use Agreement—City of Santa Monica	\$0	\$11,197,764	\$11,197,764	Location
Joint Use Agreement—City of Malibu	\$246,827	\$0	\$246,827	Location
Santa Monica Ed Foundation Donation		\$1,800,000	\$1,800,000	Location
Malibu Fundraising Entity Donation	\$343,716		\$343,716	Location
Lease Rental ²		\$4,485,412	\$4,485,412	Location
Interest Earned (Based on Tax Revenue %)	\$230,744	\$469,256	\$700,000	Property Tax Percentage
Miscellaneous Local Revenues	\$2,311,590	\$17,026,663	\$19,338,253	Student Population
Total Local Revenues	\$3,132,877	\$63,042,929	\$66,175,806	

¹\$4.2 million previously received by Santa Monica-Malibu USD is “lost” with the transfer of the territory to the proposed Malibu USD

²Assumed all leases pertain to Santa Monica schools

However, should it be determined that the proposed Malibu USD could in fact retain its portion of Measure R, this could have a substantial financial impact on the district as its share would increase its ending fund balance by \$4.2 million (Figure 13).

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Figure 13: Fiscal Impact of Measure R Parcel Tax Revenues

	Malibu USD	Santa Monica USD
Revenues		
Other Local Revenues	\$4,237,787	\$0
Fund Balance Change	\$23,418,519	(\$25,878,975)
Reserves		
Beginning Fund Balance	\$6,881,094	\$50,684,631
Ending Fund Balance	\$30,299,613	\$24,805,656

Based on the financial impact, it would be difficult to argue that the remaining Santa Monica USD district, and more importantly its students, would not be harmed by the precipitous drop in per-ADA revenue, as well as loss in parcel tax revenues, caused by the reorganization of Santa Monica-Malibu USD to Malibu USD and Santa Monica USD. Absent a plan that creates a mitigated path (soft landing) for Santa Monica USD,¹² the proposed reorganization would have a substantial negative effect on the fiscal status of the remainder of the existing district affected by the proposed reorganization.

Summary and Conclusions

The main focus of this analysis is Criterion Number 9: Effect on Fiscal Status and Management and the fiscal impacts of the proposed reorganization on both the remaining Santa Monica USD and the proposed Malibu USD.

The analysis clearly illustrates that the proposed reorganization would have a substantial negative effect on the fiscal health of the remaining Santa Monica USD. The reorganization would result in significant revenue loss for the remaining district both in terms of one-time losses from the division of assets as well ongoing losses in per-ADA funding. The impact would be disproportionate given the number of students that would remain within the district as compared to the number of students that would become part of the proposed Malibu USD. The funding disparities between the two districts would be stark, and the losses that would be experienced by the remaining Santa Monica

¹²SSC understands that there is an “offer” on the table to mitigate the impacts. However, as no agreement has been reached between the two parties, this report does not consider any proposed fiscal mitigation measures between the two parties.

Los Angeles County Office of Education

Reorganization Financial Feasibility Study

Santa Monica-Malibu Unified School District

March 3, 2025

USD would undoubtedly affect the educational programs currently being offered to students within the current Santa Monica-Malibu USD.

In addition, SSC staff was also asked to provide, to the extent possible, an evaluation of the financial impacts as they apply to the remaining criteria. While all criteria would be in some way impacted by the fiscal realities of the proposed reorganization, Criterion Number 3: Equitable Division of Property/Facilities, Criterion Number 5: No Substantial Increase in State Costs, and Criterion Number 7: No Substantial Increase to School Facilities Costs are the three criteria that would be most directly impacted.

- Criterion Number 3: Equitable Division of Property/Facilities—Requires that the proposed reorganization result in the equitable divisions of property and facilities, including facilities, land, other property, debts and monies due but not collected. This criterion is likely the most critical as the proposed reorganization will include the division of real and personal property—with the added complication of staff currently assigned to school sites within the proposed Malibu USD—debt, fund balance reserves and liabilities, student funds, and postretirement benefits. This has also been one of the main points of contention between the two parties over the years. Given this fact, it is likely that should the Los Angeles County Committee vote to approve the proposed reorganization, an arbitrator or board of arbitrators will need to be convened—as called for in the Education Code—to arrive at an equitable division of property.
- Criterion Number 5: No Substantial Increase in State Costs—Requires an analysis to determine if there will be any increase in costs to the state as a result of the proposed reorganization and whether it will be significant and otherwise incidental to the reorganization. An increase in state costs would typically be a result of greater funding from the state under the LCFF. Based on the analysis conducted for Criterion Number 9, both districts would be community-funded districts post reorganization and, therefore, would not result in an increase in state costs.
- Criterion Number 7: No Substantial Increase to School Facilities Costs—Requires an analysis to determine if there will be any increase in school facilities costs as a result of the proposed reorganization and whether the costs will be insignificant and otherwise incidental to the reorganization. An increase would only occur if additional facilities are needed to accommodate existing or projected enrollment post reorganization, as a result of the reorganization, which is unlikely given the current and projected enrollment of the proposed and remaining districts.

Finally, it is important to note that should this matter go before the SBE, it is granted broad authority to specify the conditions of district reorganizations. The SBE has the final word in defining key issues, such as the area of election, the methodology for determining the division of district assets, application of CEQA regulations, and any other criteria the SBE deems relevant whether or not the criteria is specified in statute. In its deliberative process, the SBE places

Los Angeles County Office of Education Reorganization Financial Feasibility Study

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considerable weight upon the input provided by the county committee evaluating the petition to reorganize the district. This study provides data and analyses from which the Los Angeles County Committee can make reasonable recommendations and provide reasoned arguments to support its ultimate recommendation to the SBE.

Appendix A—Abbreviations

2025 Study2025 Reorganization Financial Feasibility Study

ABAssembly Bill

ADAAverage Daily Attendance

CCR.....California Code of Regulations

CDE.....California Department of Education

CEQA.....California Environmental Quality Act

CFDCommunity Facilities District(s)

EC §.....Education Code Section

EPAEducation Protection Account

ESElementary School

GO.....General Obligation (bonds)

HandbookSchool District Organization Handbook

LACOELos Angeles County Office of Education

LCFFLocal Control Funding Formula

LEALocal Education Agency

MPP.....Minimum Proportionality Percentage

MSAMinimum State Aid

RL.....Revenue Limit

SBEState Board of Education

SFIDSchool Facilities Improvements District

SSC.....School Services of California, Inc.

UPPUnduplicated Pupil Percentage

USD.....Unified School District

Enclosed are Public Comments
received up until 4:30 PM
on Friday, March 28, 2025.

They pertain to the County
Committee Regular Meeting
on April 2, 2025 at 9:30 AM.

From: Mark DiPaola <mark@d3ventures.com>
Sent: Tuesday, March 25, 2025 5:25 PM
To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>
Subject: April 2 meeting - Public comment

Dear County Committee,

I write to you as Executive Vice President of the Malibu Elementary School PTA. Our students and staff have suffered greatly under the uncaring hand of SMMUSD who separated from us long ago in their actions, but will never separate willingly from our money.

We desperately need the County Committee to split the District on April 2, and not fall for the unending rhetoric that SMMUSD will vote to do it "tomorrow." It's like a real life version of the tacky "Free Beer Tomorrow" sign posted in dive bars — except we've fallen for it for nearly 20 years as SMMUSD has promised separation is "just around the corner." No more.

SMMUSD can always choose to vote in favor of the negotiated agreement after the County Commission votes to separate. In fact, that's likely the *only* way they will ever do it.

Please do not delay the vote. On April 2, our children need you to vote to separate Malibu from an out-of-touch beauracracy located hours away, and end the last non-contiguous school district in California.

Thank you,

Mark DiPaola
Office 424.348.1118
Mobile 310.869.5442

From: Paula Larmore <pjlarmore@gmail.com>
Sent: Tuesday, March 25, 2025 8:34 PM
To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>
Subject: Malibu Petition – Oppose

Dear Members of the LA County Committee for School District Organization,

I am a parent of two elementary school children in SMMUSD and respectfully request that you deny the City of Malibu petition to divide SMMUSD into two districts. Malibu's petition fails to support 88% of the students in the district. It threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. This plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am not opposed to the concept of unification. However, the petition submitted by the City of Malibu does not adequately address issues of financial equity or include protections for diverse and vulnerable students. As discussed in a prior committee staff report, Malibu's petition fails to meet the nine criteria needed to approve a new school district. Specifically, this same petition was deemed by County Committee staff to be deficient in 8 of 9 criteria.

SMMUSD and Malibu should finish the mediation process that both parties have spent so much time on. The mediation process was based on equity and each new district having similar services on Day One. Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

In sum, I urge you to deny Malibu's petition at your upcoming April 2nd meeting.

Sincerely,

Paula Larmore

From: Wade Major <wm@lakemajor.com>

Sent: Tuesday, March 25, 2025 9:00 PM

To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>

Subject: Attn County Committee -- April 2 Meeting re Malibu Unification

Honorable County Committee Members:

You've heard from me extensively over the past several years, so I apologize for belaboring the point — but I love my community, I love our families and I love our kids. Even before the fire, there was pain in our community — but that pain has now exceeded any reasonable threshold and our community simply needs hope. Schools are hope. Children are hope. The future is hope. We needed a Malibu Unified School District before. But we need it so much more now. What was once urgent has now become existential. To rebuild our homes, our lives, our families as we build a new school district would be transformative for this deeply wounded community. Our children are in deep pain. As I write this, my daughter is weeping inconsolably in the next room. This has been a regular occurrence since our home was destroyed in the fire. We struggle with her trauma daily. Every other family in our position has told me their experiences are same. We cannot heal our community without healing our children.

As I have reminded you far too many times — before I assumed the presidency of AMPS, before I was a parent, I was a student in this district. I attended the same schools as my daughter and graduated from Santa Monica High School in 1983. I've seen the district up close and personal for decades. I've evacuated school because of fires, I've been subjected to school closures — everything you've heard from parents these past few weeks, I previously experienced in the 1970s and 1980s. These are not new problems. They are old problems. Irresolvable problems. Endemic problems. There is no permanent solution but unification.

The claims of declining enrollment due to declining population, declining fertility, soaring home prices — I've heard it all before. Many times. If you look at the historical data you'll see that Malibu is simply a cyclical community. As the population ages and longtime residents become empty nesters, the school population drops. In time, the cycle restarts, new families move in and the school population rises. The difference now is that we've endured nonstop tragedy and trauma for the better part of the past seven years — from fires to COVID to more fires, all of which has led to a disenrollment crisis above and beyond the normal cycles. It is not, however, a permanent crisis — the families are here. Their children attend private and parochial schools like Viewpoint, Oaks Christian and Our Lady of Malibu. An inordinate number of families also homeschool. None of them are a mystery to us. We know these families. They are our friends and neighbors. They want to come back. They will come back. As soon as they know that we have local control that will give them, as parents, a voice — and a voice they know will be heard.

I want to assure you as well that Malibu isn't just focused on its own — this is a community that prides itself on welcoming 15 million visitors every year, and insuring that their visits are meaningful and rewarding. That same seriousness will translate to our approach to education. I am personally committed to building what will one day be regarded as the most giving, the most welcoming and the most innovative school district in California. If Malibu succeeds — we all succeed.

To put a finer point on it — you held three public hearings on unification, two in Santa Monica and one in Malibu. Over the course of those hearings, two themes emerged. One, that Malibu parents showed up to advocate for their children while Santa Monica — a city ten times as populous — was consistently unable to produce any parents to likewise advocate for their children. You heard from Santa Monica politicians, school board members and a handful of their allies — but virtually no actual district parents. And two, that while Santa Monica's team focused on money, Malibu consistently spoke about the children. Because for us, it really is about the children. Children who are suffering so deeply right now. And not being fully empowered to address that suffering as a community is crushing.

Thank you for your service, your professionalism and your patience with what has been an arduous process for us all. Please give my community the tools to do right by its children. We will not disappoint you.

Kindest regards,

Wade Major
President



From: Richard Raymond <rreymondfilms@gmail.com>
Sent: Tuesday, March 25, 2025 10:15 PM
To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>
Subject: April 2 meeting public comment

Dear County Committee,

I am writing to you as a devoted parent of children attending Malibu Elementary School, compelled by the pressing need for equitable educational opportunities for our community.

Over the past years, Malibu families have endured significant hardships—including numerous school closures due to environmental challenges and a lack of responsive action from SMMUSD. These disruptions have not only greatly hindered our children's academic progress but have also underscored a persistent neglect of Malibu's unique needs by a district office too far removed—physically and emotionally—from the reality we live in.

The California Education Code emphasizes the importance of local control and responsiveness to community needs. Unfortunately, the current structure of SMMUSD has proven woefully and consistently inadequate in addressing the specific concerns of Malibu residents. The geographic and administrative disconnect has led to decisions that routinely overlook the well-being and educational continuity of our students.

This is not a partnership. This is not shared governance. This is a dysfunctional relationship—and Malibu's children are paying the price.

What breaks my heart most is how preventable it all was. With care, with urgency, with local leadership—we could have kept our schools open. Instead, we were met with silence, then bureaucracy, then excuses. And yet, our funding still flows to a district that does not represent us.

This proposal isn't just about frustration—it meets every standard you are charged to consider:

- **Equity:** Malibu students have not received equal access to education. The repeated school closures have widened the gap, and it's only getting worse.
- **Educational Performance:** A local district would be far better equipped to respond to our real-world conditions—fires, road closures, outages—and keep schools open.
- **Community Identity:** Malibu is a distinct, unified community. Local governance would reflect our values, our reality, and our children.
- **Fiscal Responsibility:** With local control, we can finally ensure that the resources we generate are used to support Malibu's students—not disappear into a larger district that does not serve us.

The prolonged delays and circular promises surrounding this issue have only deepened the challenges facing our community. It is time for decisive action.

On April 2, I'm asking you to vote for separation—not out of politics or pride, but because our kids need a district that sees them, knows them, and puts them first. We need local accountability. We need leadership that shows up.

I respectfully urge the County Committee to prioritize the well-being and future of our children by approving the formation of an independent Malibu Unified School District.

If the County Committee chooses not to act, it will be a devastating signal to the families of Malibu—that even after years of hardship, inequity, and being ignored by a distant district, our voices still don't matter. That our children must continue to endure a broken system, simply because no one was willing to take the step that could finally change it. I truly hope that's not the legacy of this decision. Our community is watching, our children are waiting, and we are asking—pleading—for you to do what is right.

Thank you for your time, attention, and service.

Sincerely,

Richard Raymond
Parent, Malibu Elementary School

From: Christa McCaffrey <christa.mccaffrey@gmail.com>

Sent: Tuesday, March 25, 2025 10:25 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: Opposition to Malibu's Terms of Separating from SMMUSD

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent to three children in SMMUSD.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria. The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Christa McCaffrey

From: Rick Mullen <mullen.rick@gmail.com>
Sent: Wednesday, March 26, 2025 9:06 AM
To: Bernstein_Victoria <bernstein_victoria@lacoed.edu>
Subject: Malibu's Petition

Dear LACOE Board Members:

Please vote to approve and support Malibu's petition for a separate school district from Santa Monica. Malibu's feasibility study is fair and "does no harm" to any student during the separation process and provides a generous tax-sharing model. In the end, each school district will be well funded.

There is no need to wait for SMMUSD to vote on this feasibility study. They have had plenty of time to review, consider and vote on it. Please do not delay this petition any longer. The time has come for this process to begin and to move to the State Board of Education for review.

Thank you for your selfless devotion to looking out for school children. Please put the children at the forefront of your priorities when considering this petition. This type of physically separated district would not be allowed today if proposed. Local control is key. Simpler is better.

Thank you for considering my comments.

Respectfully,

Rick Mullen
Former Malibu Mayor and Councilmember
Father of two children who attended Juan Cabrillo and Malibu High School

From: Erica Fener <erica.fener@gmail.com>
Sent: Wednesday, March 26, 2025 10:07 AM
To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>
Subject: Malibu Petition – oppose

Dear Members of the LA County Committee for School District Organization,

As a parent in SMMUSD, I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Erica Sitkoff
SMMUSD parent
301-221-7456

From: Kelsey McKinnon <kelsey.mckinnon@gmail.com>

Sent: Wednesday, March 26, 2025 10:21 AM

To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>

Subject: April 2nd Meeting public comment from MES PTA President

Dear County Committee Members,

I am writing to you as the Malibu Elementary School PTA President. MES remains the lowest ranked school in the district. For years, our children have endured hardships under the administration of the Santa Monica-Malibu Unified School District (SMMUSD) resulting in measurable differences in learning, resources and declining enrollment. Despite their continued reliance on our funding, the district has shown little regard for the unique needs of our school and students. Santa Monica district leaders are not a part of this community, so it's not a surprise that they don't understand what we need or want for our children and it is painfully obvious that our children are not treated equally. As the PTA President, I have tried hard to advocate for our students and am constantly shocked and frustrated by the lack of response and/or care from the district regarding my concerns.

We urge the County Committee to vote to separate Malibu from SMMUSD on April 2. For nearly two decades, the district has promised that separation is "just around the corner," but these promises have not been fulfilled. The rhetoric that SMMUSD will take action "tomorrow" has proven to be a repeated cycle of empty assurances. It is time for decisive action.

After the County Committee's vote, SMMUSD can still choose to approve the negotiated agreement. In fact, this is likely the most effective path forward for our community. And the separation will only benefit teachers working in Malibu.

Please do not delay this important decision. On April 2, the County Committee has the opportunity to vote in the best interest of our students, ending the last non-contiguous school district in California and providing Malibu with the autonomy it desperately needs.

Thank you for your consideration.

Sincerely,

Kelsey Donfeld

Parent, Malibu Elementary School and MES PTA President

From: Pinsker, Gail <gpinsker@smmusd.org>
Sent: Wednesday, March 26, 2025 10:36:37 AM
To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>
Cc: Castelo_Octavio <Castelo_Octavio@laoe.edu>; Deegan_Allison <Deegan_Allison@laoe.edu>
Subject: SMMUSD letter for 4/2/25 meeting

Hello Victoria,

Please accept the attached letter on behalf of the Santa Monica-Malibu USD Board of Education subcommittee on Malibu unification as a public comment for the April 2, 2025 meeting on this topic.

Thank you.

Best,

~gail

Gail Pinsker
Chief Communications Officer
Santa Monica - Malibu Unified School District
1717 4th St., Santa Monica, CA 90401
O: 310.450.8338 x.70230
C: 661.406.9462
www.smmusd.org



SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT

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SANTA MONICA - MALIBU UNIFIED SCHOOL DISTRICT

March 26, 2025

Los Angeles County Committee on School District Organization
Via email: Victoria Bernstein, Bernstein_Victoria@lacoed.edu

Re: Malibu Unification

Dear County Committee Members and Staff,

The Santa Monica-Malibu Unified School District (SMMUSD) remains supportive of unification ***as long as the terms are fair and equitable for all students in both Malibu and Santa Monica.*** We are aware of the importance that some members of the Malibu community place on this. Thus, despite the City of Malibu pursuing an alternative “less generous” approach, the SMMUSD is finalizing and will be considering approval of the three negotiated agreements at its April 23, 2025 board meeting.

SMMUSD has chosen not to refute the misrepresentations and false claims made by multiple speakers from Malibu at the hearings held on March 17 at SMC and November 13 in Malibu, because we believe a “tit-for-tat” does not serve the goal of achieving a fair and equitable unification and is a distraction from the true purpose of these hearings. However, we want to make clear to the County Committee that SMMUSD’s silence does not constitute assent to the misstatements made about the lack of attention and resources focused on Malibu students, the allegations made about mishandling of school needs during the recent (or past) fires, or the failure to provide the highest quality of education possible for Malibu students.

While the fires have undoubtedly been disruptive to the education of students in affected areas, whether Malibu has its own district or is part of another district, fires and the impacts will be disruptive and challenging. False claims about the SMMUSD’s response to the fires, or about achievement or lack of academic options are not relevant to the decision before the County Committee. SMMUSD will always provide for ALL of its students, including those in Malibu schools, for as long as we remain one district. Below are a few data points demonstrating the success of Malibu public schools, sharing information about school closures during the fires, and addressing the many forms of financial and operational support received by Malibu schools.

We would like to share a few recent highlights and data points:

- [US News rankings PR 5/2/24 - Malibu High School rated higher than Santa Monica HS \(Samohi\)](#)
- [Niche ranking PR 4/17/24 - A for MHS and A+ for Samohi for educational outcomes.](#)
- [Malibu High School '24 grads and where they planned to attend college.](#) 88 students listed with post-secondary plans of a grad class of about 100. (Total MHS enrollment for 2024-25 is 384)
- MHS typically has a 99% graduation rate. Samohi is about 95%.

SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT

1717 Fourth Street • Santa Monica • California 90401-3319 • (310) 450-8338 • www.smmusd.org

Board of Education: Jon Kean • Maria Leon-Vazquez • Laurie Lieberman • Alicia Mignano

Stacy Rouse • Jennifer Smith • Dr. Richard Tahvildaran-Jesswein

Superintendent: Dr. Antonio Shelton

- 2022-23 Advanced Placement (AP) Courses
 - Percent of students in AP courses at this school= 43.3%
 - Number of AP courses offered at MHS: English 5; Fine and Performing Arts 2; Foreign Language 2; Mathematics 4; Science 4; Social Science 5;
 - Total AP Courses Offered: 22
- [City of Santa Monica affirmation of supporting unification](#), if fair and just to Santa Monica
- City of Malibu and unincorporated area voters approved Bond Measure MM for Malibu schools for \$395 million in Nov. 2024 by 62.25%. [Bond projects and facilities webpages](#)
- [Facilities projects in the last 10 years at Malibu schools and in progress](#). (Scroll to line 158 for the Malibu school information.)
- Voters in Santa Monica and Malibu approved SMMUSD's Measure R parcel tax in with 73% voting in favor, establishing a permanent parcel tax to fund school programs in both Malibu and Santa Monica. [Proposed Measure R expenditures for 2024-25 school year](#).
- General education bus service is offered to Malibu families and continues to be offered through the challenges faced during and continuing from the wildfires with the ongoing closure of PCH. An additional stop was added for displaced families north of our prior routes.
- [Malibu Elementary School Principal Chris Hertz presented a school update to the Board of Education at its March 19, 2025](#) meeting held at Malibu City Hall, describing accomplishments and highlights.
- Santa Monica sales tax revenue from two ballot measures GSH and Y passing by 62% and 68% respectively is used to fund programs / staff in both Malibu and Santa Monica, totaling \$18 million annually.
- Emergency Operations Center (EOC) activated and worked daily making school status decisions in Malibu due to wildfires with the health and safety of all students and staff as our top priority. Near daily letters were sent to families and staff after careful consideration of criteria used to close schools: Fewer than two major roads in and out of Malibu (PCH each direction, Topanga, and Malibu Canyon. Note: School buses cannot travel Kanan Dume or other smaller canyon roads); Power and/or gas is off prior to start of school; School sites in evacuation zones; School sites and buildings deemed unsafe to operate; Air quality is at the hazardous level (per AQMD or EPA); Particularly dangerous fire weather as categorized by the National Weather Service; Los Angeles Sheriff's Dept (or other agency) advisory to stay off the roads and School site does not have working communications systems during a red flag warning.
- We continue to remain committed to families and staff in Malibu and Santa Monica and provide all the necessary resources and human resources as needed to any school or school community in need. During the recent dangerous wildfires, SMMUSD provided online teaching and learning when schools have closed and is offering ongoing tutoring for any concerns of learning loss, along with summer school.
- Malibu school enrollment as of 10/2/24:
 - Webster Elementary: 174
 - Malibu Elementary: 241
 - Malibu Middle: 254
 - Malibu High: 384
 - Total: 1,053
- [Malibu demographics data](#):
 - Population in 2023: 10,277
 - Median Age: 50.7 years

- [Malibu Times: 2020 Census indicates Malibu lost nearly 15% of its population since 2010](#)
- [PowerSchool Predictive Enrollment Analytics](#) - Significant data:
 - Both school age children and overall population reflect “significant decline” on page 2. Data chart:

Phase of Life presents how a community changes and people age through their various life phases.

Phase of Life	Actual Population by Year & Phase				Percent of Pop by Year & Phase			
	2020	2023	2028	2033	2020%	2023%	2028%	2033%
Before Formal Schooling: 0 to 4	412	681	915	957	2.4%	4.1%	5.5%	6.1%
Required Formal Schooling: 5 to 17	1,890	1,666	1,542	751	11.2%	10.0%	9.2%	4.8%
College/Career Starts: 18 to 24	3,443	3,016	2,697	2,438	20.4%	18.1%	16.1%	15.4%
Singles & Young Families: 25 to 34	1,246	1,655	2,251	2,228	7.4%	9.9%	13.5%	14.1%
Families & Empty Nesters: 35 to 54	3,398	3,097	2,795	3,016	20.2%	18.6%	16.7%	19.1%
Enrichment Yrs Singles/Cpls: 55 to 64	2,700	2,555	2,203	1,880	16.0%	15.3%	13.2%	11.9%
Retirement Opportunities: 65 & over	3,764	3,977	4,333	4,522	22.3%	23.9%	25.9%	28.6%
Total:	16,853	16,647	16,736	15,792	100.0%	100.0%	100.0%	100.0%

Sources: US Census Bureau, Synergos Technologies Inc., PowerSchool

Page 5

As is detailed above, it is clear that the SMMUSD school board, district leadership, Malibu schools’ leadership, teachers and staff, care deeply about all students. Malibu students continue to enjoy an extraordinary education along with social emotional learning, mental health supports, a vast array of electives, career technical education, extremely high graduation rates, elite school college acceptances, athletics and extracurricular opportunities with results that ranks Malibu High School in the top six percent in the country.

In the absence of board-approved final unification agreements, the district cannot support the City’s unification petition. We owe it to all of our students in both communities, including our students who are English learners, special education and socio-economically disadvantaged to ensure that unification be accomplished in a fair and equitable manner and in a way that does not jeopardize future funding needed to provide the District’s students with appropriate educational opportunities.

Sincerely,

SMMUSD Board of Education Unification Subcommittee:

Jon Kean
Laurie Lieberman
Dr. Richard Tahvildaran-Jesswein

From: Yvonne Kawano <yvonne.kawano@gmail.com>
Sent: Wednesday, March 26, 2025 10:57 AM
To: Bernstein_Victoria <bernstein_victoria@lacoed.edu>
Subject: Malibu Petition – Oppose

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent of two students in the Santa Monica Malibu School District. While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria. The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee. Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

To conclude, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Yvonne Kawano

From: Jessica DiPaola <heyjessd@gmail.com>
Sent: Wednesday, March 26, 2025 11:43 AM
To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>
Subject: SMMUSD: In Support of District Separation

Hi Victoria,

Per the LACOE website:

"The County Committee may vote to recommend approval of a proposal for unification or formation if it determines it is not practical nor possible to apply the Ed Code Sec 35753 conditions literally and circumstances with respect to the proposal present an exceptional situation.... Staff will use their discretion in determining which considerations to address in preparing reports and recommendations for the County Committee. "

As you know, SMMUSD is the only non-contiguous District in California, because it is not legal. That alone should be the exceptional situation needed, regardless of any other criteria.

Please do not delay the vote, and separate Malibu from Santa Monica on April 2.

With Gratitude,

Jessica DiPaola

Sent via [Superhuman](#)

From: Benjamin Clyne <b.s.clyne@gmail.com>
Sent: Wednesday, March 26, 2025 12:22 PM
To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>
Subject: Separating MMUSD

To whom it may concern-

We are the parents of two MES students and are proud Malibu residents. I'll keep my thoughts on separation short and to what I feel are the irrefutable key issues:

Noncontiguous school districts are no longer allowed under state law and with good reason. We have little to no agency to solve our own unique problems as essentially a rural district at the mercy of a city district. SMMUSD have little to no understanding of our unique issues and have shown time and again an unwillingness to learn or adapt. Which is all the more galling as we contribute greatly to the tax base with virtually no representation in the school district for those taxes.

All will be better off to go our separate ways and grow the gardens we reside in. And I am unaware of a single parent in Malibu who thinks differently. Which, in essence, makes us hostages.

Please vote to separate and let everyone flourish.

Thank you for your time and consideration,

Ben Clyne

From: Alexander Frankian <alexanderfrankian@gmail.com>

Sent: Wednesday, March 26, 2025 12:31 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: Malibu Elementary Unification - Proponent

Dear Ms. Bernstein and SMMUSD,

I have 2 children in the City of Malibu whom are students at Malibu Elementary School.

I am a proponent of Unification for Malibu to have its own School District for a plethora of reasons. Most importantly is that we Malibu Residents want to govern the future of our own children. Please respect our request.

Thank you.

Respectfully,

Alexander Frankian

From: Joanna Schroeder <joannafschroeder@gmail.com>

Sent: Wednesday, March 26, 2025 12:35 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: Public comment on SMMUSD separation

I've been a parent in this district since 2010, when my oldest started kindergarten.

Pretty much all along, this separation has been an issue. At first, this issue seemed fueled by what seemed like surface-level concerns.

However, since 2018 and the Woolsey Fire, the dynamic has shifted and proven -- time and again -- that being a non-contiguous united district is harming kids from both sides of the LAUSD district that separates us, geographically.

I have listened in on many, many district meetings in my nearly 15 years and never have I heard a more compelling case made than I did in the last public comments. The non-contiguous district is illegal for a reason, and being grandfathered in is not a reason to continue.

Yes, the board said they want to reconsider offers from Malibu -- but said they want more time. The truth is, they don't need more time. The facts have not changed. Malibu is prone to geographical crisis, as has been proven time after time. It drains the energy and time of SMMUSD leadership whenever these crises occur, time that could be spent on the many, many more Santa Monica students.

Malibu is better equipped to handle Malibu local problems, like the closed highway and energy resources. Santa Monica can focus on being a small urban area with equally important, but very different, needs.

All of our children deserve a top-notch education and this united-but-divided district is robbing many of them of that opportunity.

Now is the time to take action. Future generations of kids from both sides will be grateful.

--

Joanna Schroeder, author

Gracelessly exploiting the signature line for self-promotion:

[Substack](#), [LinkTree](#)

From: Heather Alfano <heatheralfano@gmail.com>
Sent: Wednesday, March 26, 2025 12:40 PM
To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>
Subject: Malibu & SMMUSD

Hello-

I am writing in to request that the LACOE board does not delay their vote to approve the petition. The district has had ample time to review and consider the petition. In fact, we have been deliberating unification for 20 years! We have a fractured community at this time, postfire(s). Please consider what a further delay will do to our progress as a school system. Malibu has shown up in droves for every single meeting... pleading our case. The only voices we hear from Santa Monica have conflicts of interest.

We look forward to your vote at your April 2nd meeting.

Best,

Heather Alfano (mother of 3)

From: Maja Primorac <maja.primorac@gmail.com>

Sent: Wednesday, March 26, 2025 12:44 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: A case for an independent Malibu Unified School District

Dear Ms. Bernstein,

I hope this email finds you well. I am writing to request that you work with Malibu to approve the creation of an independent school district. The current structure of Santa Monica / Malibu Unified School District (SMMUSD) is not effectively meeting the needs of Malibu students, and I feel it is critical for our community to have more local control over our educational system.

I have three children, two of whom, Kyle and Lea, currently attend Malibu Elementary School, and I plan to enroll my third, Penelope, there next year... unless we decide to homeschool.

Since the school closures and the district's inadequate or non-existent response to concerns about future management—particularly regarding power shutdowns and road closures—my husband and I have been exploring other educational options. We've toured several private schools, however, our choice currently seems to be homeschooling or staying at Malibu Elementary as long as Malibu becomes independent from Santa Monica Unified School District.

When we were first deciding on an educational track for our kids, I personally was a strong proponent of public education. As a product of California's public school system, I have fond memories of the quality education I received and deeply respect the effort teachers put into their classrooms. However, since the shutdowns, I've seen a noticeable decline in my children's progress. Every time a school closes, they lose valuable momentum. For example, my first grader, Kyle, in January of 2025 he scored in the 60th percentile on the STAR assessment, which is a significant drop from the 80th percentile in the spring of 2024.

Our teachers work hard, and each one has an aide funded by our PTA, therefore no child should experience such a drastic decline in performance. The district offered summer school to address the loss of instruction, but many parents, including myself, feel that summer school is more of a punishment than a remedy. When I proposed this to Kyle, he asked why he would go. He stated that he did not do anything wrong. Correct, he did not do anything wrong and so we are currently supplementing with three additional hours of in-person tutoring. District offered on-line tutoring, but, for our family, we find any online support for young children will not be as effective as in-person. Malibu parents have also requested that the district extend Fridays to full days of instruction, but these requests have been continuously ignored. Parents have proposed numerous solutions to address these issues, including providing nearby hotel accommodations for teachers during road closures and hiring substitutes from Malibu, Agoura Hills, or Thousand Oaks. Unfortunately, these suggestions do not seem to be considered. If these are considered, the District has not communicated with us.

Additionally, it remains unclear whether Malibu Elementary and other Malibu school backup power systems are fully prepared to ensure communication and maintain instructional continuity during any emergency. While Malibu Elementary School parents and the local community have provided infrastructure to support power shutdowns and communications, it seems that SMMUSD has not taken timely action or has chosen not to act on these concerns.

In light of these ongoing issues, it has become clear that SMMUSD does not have the knowledge and understanding of our community nor the necessary resources or infrastructure to meet the needs of Malibu students in an effective and timely manner. I do not want to pull my children out of Malibu Elementary, therefore I urge you to seriously consider approving the separation of Malibu from Santa Monica and the formation of an independent school district. This would allow our community to make the necessary adjustments to ensure a safe and effective learning environment for our children.

Thank you for your time and consideration.

Sincerely,

Maja Primorac, Ph.D.
(626) 524-4333

From: Area M. Kramarsky <amadaras@yahoo.com>

Sent: Wednesday, March 26, 2025 12:57 PM

To: Bernstein_Victoria <bernstein_victoria@lacoed.edu>

Subject: Malibu Petition at April 2 meeting - Please oppose

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the 2017 Malibu petition at your upcoming meeting on April 2, 2025. My name is Area Kramarsky and I'm a resident of the City of Santa Monica in the county of Los Angeles. I attended SMMUSD schools and was pleased to be able to send my children to SMMUSD schools as well. The school system is a huge part of why we chose to raise kids in Santa Monica, and I hope you help protect the quality of these schools by denying the Malibu petition to split the school district at this time. This split is much like a divorce – it's not pretty, and if one party wants out, then the marriage cannot last. I'm not opposed to Malibu leaving at some point, but that has to be done in a way that does not disadvantage the children of Santa Monica who make up almost 90% of the current district.

There was a mediation process underway, but as I understand it Malibu is attempting to push this pre-existing petition through without the safeguards that mediation was putting in place. And why wouldn't they? If they can railroad their 2017 proposal through, then of course they'll try. Please tell them they must return to mediation and negotiate an equitable solution that protects ALL children of the current Santa Monica-Malibu Unified School District.

If they want to move faster, then they should get back to the mediation table as soon as possible.

Malibu's 2017 petition, which you are considering, threatens Santa Monica students with deep budget cuts and fewer programs. This proposal ignores real progress made through the mediation process, and doesn't address issues of financial equity or protections for vulnerable populations. As I understand it, your own staff report indicated that the petition failed to meet 8 of the 9 criteria to approve a new school district.

Please reject this petition and encourage Malibu to re-enter the mediation process where the needs of all students were being considered. The result will be a proposal more likely to obtain the State Board's approval. Through mediation, both parties can go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

I ask you to deny this unfair and inequitable Malibu petition at the upcoming April 2, 2025 meeting. I apologize that I do not know the agenda item number.

Thank you,

Area Kramarsky

cell: 310-663-2729

resident of Santa Monica, CA

From: Naseem Sayani <nsayani@gmail.com>

Sent: Wednesday, March 26, 2025 12:58 PM

To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>

Subject: Sharing our full support for an independent Malibu School District

Hello,

I am reaching out ahead of tonight's meeting and vote to share our families' full support for an independent Malibu School District.

My son attends Malibu Elementary School, and he and his classmates deserve the attention and focus of a dedicated school district that understands our city's needs and characteristics closely and uniquely. The everyday needs of our students are very distinct from that of the broader Santa Monica area -- or terrain, walkability, weather, sports locations, location flexibility, etc are not the same as broader Santa Monica; and as the Woolsey fires from 6 years ago and the recent Palisades fires also made apparent, our disaster support needs also very different.

We need a school district and team that can address what our students need quickly and directly without the burden of a much broader district to also solve for at the same time.

Our students, teachers, and families deserve better. Our tax dollars should be serving our children and students more directly.

Thank you.

Naseem Sayani

Naseem Sayani

nsayani@gmail.com

c; 917-562-8992

From: Anne Hiura <ahiura@yahoo.com>
Sent: Wednesday, March 26, 2025 12:59 PM
To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>
Subject: Letter Concerning Separation of SMMUSD

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent of 3 students within the SMMUSD.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

In summation, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting. Thank you for your time and consideration.

Sincerely,

Anne Hiura

From: Pavel Lerner <pavellerner@gmail.com>
Sent: Wednesday, March 26, 2025 1:03 PM
To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>
Subject: Independent Malibu Unified School District

Dear Ms. Bernstein,

I hope this email finds you well. I am writing to request that you work with Malibu to approve the creation of an independent school district. The current structure of Santa Monica / Malibu Unified School District (SMMUSD) is not effectively meeting the needs of Malibu students, and I feel it is critical for our community to have more local control over our educational system.

I have three children, two of whom, Kyle and Lea, currently attend Malibu Elementary School, and I plan to enroll my third, Penelope, there next year... unless we decide to homeschool.

Since the school closures and the district's inadequate or non-existent response to concerns about future management—particularly regarding power shutdowns and road closures—my wife and I have been exploring other educational options. We've toured several private schools, however, our choice currently seems to be homeschooling or staying at Malibu Elementary as long as Malibu becomes independent from Santa Monica Unified School District.

Our teachers work hard, and each one has an aide funded by our PTA, therefore no child should experience poor performance. The district offered summer school to address the loss of instruction, but many parents, including myself, feel that summer school is more of a punishment than a remedy. When I proposed this to Kyle, he asked why he would go. He stated that he did not do anything wrong. Correct, he did not do anything wrong and so we are currently supplementing with three additional hours of in-person tutoring. District offered on-line tutoring, but, for our family, we find any online support for young children will not be as effective as in-person. Malibu parents have also requested that the district extend Fridays to full days of instruction, but these requests have been continuously ignored. Parents have proposed numerous solutions to address these issues, including providing nearby hotel accommodations for teachers during road closures and hiring substitutes from Malibu, Agoura Hills, or Thousand Oaks. Unfortunately, these suggestions do not seem to be considered. If these are considered, the District has not communicated with us.

Additionally, it remains unclear whether Malibu Elementary and other Malibu school backup power systems are fully prepared to ensure communication and maintain instructional continuity during any emergency. While Malibu Elementary School parents and the local community have provided infrastructure to support power shutdowns and communications, it seems that SMMUSD has not taken timely action or has chosen not to act on these concerns.

In light of these ongoing issues, it has become clear that SMMUSD does not have the knowledge and understanding of our community nor the necessary resources or infrastructure to meet the needs of Malibu students in an effective and timely manner. I do not want to pull my children out of Malibu Elementary, therefore I urge you to seriously consider approving the separation of Malibu from Santa Monica and the formation of an independent school district. This would allow our community to make the necessary adjustments to ensure a safe and effective learning environment for our children.

Thank you for your time and consideration.

Sincerely,

--

Paul Lerner
323-418-2266

From: Scott M. Lowry <scott@lawlb.com>

Sent: Wednesday, March 26, 2025 1:07 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: Support For Malibu School District Separating from the Santa Monica School District

Victoria:

I am writing today in support of the Malibu School District separating from the Santa Monica School District. I have been a resident of Malibu for more than a decade, and I now have a six year old attending Malibu Elementary School and my youngest will start attending school in Malibu next year.

I have watched the community struggle with school-related issues over the last 10+ years and, in that time, I have gotten to know quite a few people in the community, including now because we attend school and community related-events with our kids where we meet other parents, teachers, volunteers, community leaders, etc., and I can honestly say that I have yet to meet a single person in the community (parent or otherwise) who does not support this separation.

The Malibu community has been incredibly vocal about the fact that we do not want to be part of the Santa Monica School system, for reasons I understand have been hashed out with the County for years now (which I won't repeat here for the sake of brevity). I don't normally weigh in on topics of this nature, but it is important for our community that we be allowed to separate, and I feel an added voice before tonight's vote would be beneficial.

Frankly, no community should be forced to maintain a relationship with another, when that relationship is clearly not working; and this is true in virtually all walks of life. Continuing to force that relationship is not good for anyone, and most importantly in this situation, it is not good for the students who attend school in Malibu. At this point, and as you might be able to recognize at this point, I just don't see our community being able to move on from this issue until the separation is approved.

Thus, I would respectfully request that the County make a recommendation that Malibu should have its own school district and be able to separate from the Santa Monica School District.

If there is anything I can do in support of separating, please let me know.

Regards,

Scott M. Lowry

Attorney at Law

Lowry Blixseth APC

30423 Canwood St., Ste. 215

Agoura Hills, California 91301

Phone: 818-584-6460

Fax: 818-574-6026

www.LawLB.com

From: Ana Sanson <ana.c.sanson@gmail.com>
Sent: Wednesday, March 26, 2025 1:18 PM
To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>
Subject: Please vote for Separation from SM

Hello,

I am writing as an advocate, parent, and very involved volunteer to 3 boys at Malibu Elementary School. As a product of the public school system myself, I am a big proponent of public schools and their ability to provide a wonderful education and academic and social experience for our children, when they are run properly, have the support of their district, and put the needs, education, and safety of our children and staff/ teachers first.

This is our second year in this (SMMUSD) school district, as we came from neighboring Oak Park School District in the Conejo Valley. Unfortunately I have seen and experienced a huge difference in the way our kids here in Malibu and the needs of our students and staff, have been considered. This is very sad and unnecessary, and continues to deplete from Malibu schools by way of declining enrollment (loss of students to private schools, etc), staffing, safety (we need more help on campus, and clearly marked pedestrian lines), sanitation (we don't have a daily janitor and often bathrooms are closed due to unsanitary conditions), and EDUCATION (loss of school days because of lack of consideration and foresight).

For me, it is the decisions, initiatives, and actions that a district takes today to handle crises and challenges, and to support a school and students to grow and thrive, that show how well equipped, prepared, and organized that district is, to provide for and manage its schools and community. And today, I don't consider SMMUSD to be succeeding at this when it comes to Malibu schools at all.

- I do see a district that prioritizes maintaining funding they're going to miss out on, (that I don't feel ever reaches Malibu schools in a sufficient, equitable way in the first place).
- I see a district that is overwhelmed or unable to respond in a timely manner to important issues and requests, or even be able to make decisions in a timely manner for the needs of our school.

Please consider why parents would want to take SO many years and SO much of their time, to continue to fight for this separation year after year and show up all the way in SM for meetings/hearings again and again even when PCH was closed most recently bc of the Palisades fire. This must how you how dire the situation is and how passionate we are about this. We wouldn't go through the trouble otherwise.

Thank you for your time in this and careful consideration. I hope you recommend what's right based on the needs of our students, our school, and our community.

Best,

Ana Sanson
Parent of 3 Students at Malibu Elementary
Exec VP @ MES 2025-2026 School Year
ana.c.sanson@gmail.com

--

Ana Sanson

From: Shirin Miller <shirinfaares@gmail.com>
Sent: Wednesday, March 26, 2025 1:19 PM
To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>
Subject: Malibu Petition – Oppose

Dear Members of the LA County Committee for School District Organization,

As a parent in SMMUSD, I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Shirin Miller
SMMUSD parent
626-379-5430

From: Danielle L <danielle.davies.litak@gmail.com>
Sent: Wednesday, March 26, 2025 1:48 PM
To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>
Subject: SMMUSD Unification

Dear Victoria Bernstein,

I am writing to express my strong opposition to the City of Malibu's petition for unification of the Santa Monica-Malibu Unified School District (SMMUSD). After carefully reviewing the terms of the petition and considering the long-term impact on both communities, I believe that the proposed division fails to address critical issues related to equity, access, and the overall well-being of students in both Malibu and Santa Monica.

The unification proposal would lead to an inequitable division of funding, which disproportionately benefits Malibu while leaving Santa Monica students at a severe disadvantage. As currently outlined, Malibu would receive \$27,651 per student, while students in Santa Monica would only receive \$13,759 per student. This stark contrast in funding is concerning, as it creates a significant disparity for students— including students with disabilities, English learners, and at-risk youth. The proposed division also has the potential to exacerbate existing inequities by promoting the creation of a district with a significantly less diverse student population. This is not just a matter of funding, but of social and educational access.

The terms of the unification request, as they stand, are neither fair nor just for students in Santa Monica. The current proposal does not provide a balanced or equitable distribution of resources, nor does it safeguard the diversity and educational access that is so important to the success of all students. For these reasons, I respectfully urge the Los Angeles County Office of Education to deny the petition for unification in its current form. The current terms need to be revisited to guarantee that every student has access to a quality, equitable education.

Thank you for your time and consideration. I hope that you will act in the best interests of all students by denying the unification petition as it stands.

Sincerely,

Danielle Litak
Parent of SMMUSD Students
danielle.davies.litak@gmail.com, 310.923.6029

Danielle Litak
446 San Vicente Blvd Unit 106
Santa Monica, CA 90402
danielle.davies.litak@gmail.com
310.923.6029

3/26/2025

Los Angeles County Office of Education
Attn: Victoria Bernstein
9300 Imperial Highway
Downey, CA 90242

Dear Victoria Bernstein,

I am writing to express my strong opposition to the City of Malibu's petition for unification of the Santa Monica-Malibu Unified School District (SMMUSD). After carefully reviewing the terms of the petition and considering the long-term impact on both communities, I believe that the proposed division fails to address critical issues related to equity, access, and the overall well-being of students in both Malibu and Santa Monica.

The unification proposal would lead to an inequitable division of funding, which disproportionately benefits Malibu while leaving Santa Monica students at a severe disadvantage. As currently outlined, Malibu would receive \$27,651 per student, while students in Santa Monica would only receive \$13,759 per student. This stark contrast in funding is concerning, as it creates a significant disparity for students—including students with disabilities, English learners, and at-risk youth. The proposed division also has the potential to exacerbate existing inequities by promoting the creation of a district with a significantly less diverse student population. This is not just a matter of funding, but of social and educational access.

The terms of the unification request, as they stand, are neither fair nor just for students in Santa Monica. The current proposal does not provide a balanced or equitable distribution of resources, nor does it safeguard the diversity and educational access that is so important to the success of all students. For these reasons, I respectfully urge the Los Angeles County Office of Education to deny the petition for unification in its current form. The current terms need to be revisited to guarantee that every student has access to a quality, equitable education.

Thank you for your time and consideration. I hope that you will act in the best interests of all students by denying the unification petition as it stands.

Sincerely,

Danielle Litak
Parent of SMMUSD Students
danielle.davies.litak@gmail.com, 310.923.6029

From: Michon Herman <michonparris@aol.com>
Sent: Wednesday, March 26, 2025 1:51 PM
To: Bernstein_Victoria <bernstein_victoria@lacoed.edu>
Subject: Please deny Malibu's petition for separation

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am an involved parent and community member in SMMUSD.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Michon Herman

From: Patti Braun <pattibraun@aol.com>

Sent: Wednesday, March 26, 2025 1:58 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: The City of Malibu 2017 Unification Petition – Oppose

Dear Members of the Los Angeles County Committee for School District Organization,

I am writing today as a long-time leader in SMMUSD school-affiliated organizations and site governance. My children attended and graduated from our local Santa Monica-Malibu schools, and I have a young grandchild who will attend Santa Monica schools in a few years. Since 1996, as a volunteer, I have created and/or supported programming that serves our SMMUSD schoolchildren and their families, with a focus on student well being, free arts experiences for all, and equitable outcomes. Currently, as a volunteer, I run a program that provides food-insecure SMMUSD students throughout Santa Monica and Malibu with nutritious, shelf-stable food for the weekends (when the free breakfasts and lunches provided by our school cafeterias are not available). I am very well versed in the significant needs of our most vulnerable students.

It is for the sake of *these* students in particular that am writing to ask the Committee to deny (once again) the original 2017 Petition submitted by the City of Malibu to divide SMMUSD.

It is surprising that the Committee has been called upon once again consider Malibu's 2017 Petition, particularly since the mediation process' agreements are near finalization. This Petition's funding formula, if approved, would bring about inequitable outcomes—deep budget cuts, reduced staffing and programming, and jeopardized delivery of services, that would disproportionately harm students attending Santa Monica schools for decades. Santa Monica's Special Education students, at risk students, and English learners would be most negatively affected if this Petition is approved.

I am not against Malibu's unification, but it must be accomplished with equity and with a continuation of services in both educational communities; both new districts should be funded to offer similar services and staffing from the very start. The Petition submitted by the City of Malibu does not adequately provide necessary protections for SMMUSD's most vulnerable students.

Instead, the unification's mediation process *does* continue to offer an amicable and efficient path—one that allows the two agencies to get there *together*, considers the needs of *all* district students, and ensures that fairness and sustainability will be prioritized. *This* is how an equitable unification will be realized.

In conclusion, I do not support the original 2017 Malibu Petition. At your meeting on April 2, 2025, I ask you to deny this Petition. Thank you for your consideration.

Sincerely,

Patti Braun

pattibraun@aol.com

310 621-7119

From: Joy Moini <jsmoini@gmail.com>
Sent: Wednesday, March 26, 2025 1:59 PM
To: Bernstein_Victoria <bernstein_victoria@lacoed.edu>
Subject: Strong Opposition to Malibu Petition

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent of two kids in SMMUSD-- a second grader at Grant, and 6th grader at JAMS and chose to make many sacrifices to be able to send our kids to school here and be a part of this community.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Joy Moini
2328 27th St.
Santa Monica, CA 90405
310-310-1522

From: Staenberg, Robbie <Robbie.Staenberg@asm.ca.gov>

Sent: Wednesday, March 26, 2025 2:22 PM

To: Castelo_Octavio <Castelo_Octavio@laoe.edu>; Bernstein_Victoria
<Bernstein_Victoria@laoe.edu>

Subject: Letter From Assemblymember Zbur Re 4/2/25 Meeting of the Committee on School District Organization

Good afternoon Octavio and Victoria,

Attached, please find a letter from Assemblymember Rick Chavez Zbur to the members of the Los Angeles County Committee on School District Organization regarding the Committee's 4/2/25 meeting. We would like to make sure that this letter is included in the record and shared with the members of the Committee. Thank you!

(I am emailing both of you because, in the past, I have sent a letter like this to Octavio, but on the LACOE site, Victoria was listed. Either way, thank you both for your help and attention to this matter.)

All the best,

Robbie Staenberg

Field Representative

Assemblymember Rick Chavez Zbur (AD-51)

[Democratic Caucus Chair](#) of the California Assembly

Office: (323) 436-5184





March 25, 2025

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's Petition to Separate from Santa Monica-Malibu Unified School District

Dear Committee Members:

As the Assemblymember for the 51st Assembly District, I represent the vast majority of the students that are educated in the Santa Monica-Malibu Unified School District (SMMUSD). I wrote to this committee on November 8, 2024 regarding the City of Malibu's petition to separate from SMMUSD, and I write today because I understand that the Committee may be voting on this matter on April 2nd.

In my previous letter, I stated my belief that this petition is premature given the current status of negotiations between the City of Malibu and SMMUSD, which have led to positive significant progress toward a negotiated resolution. Demonstrating this progress is the fact that the SMMUSD Board of Education has agreed to the negotiated unification agreements for their upcoming Board meeting on April 23rd.

As I noted in my November letter, it is my belief that the City of Malibu's 2017 petition failed to meet the majority of the criteria to which such petitions are subject under state law. This failure led to a good faith mediation process that aimed to identify a path to a fair and equitable separation that would not harm the approximately 8,700 students who are served by the current school district. The agreements that the SMMUSD Board will be considering on April 23rd represent the next step in that process and demonstrate that SMMUSD is making serious progress toward resolving the situation in a way that meets the needs of all students.

For this reason, along with the additional reasons I articulated in my November 8th letter, I respectfully ask that the Los Angeles County Committee on School District Organization schedule its decision after April 23rd. Barring that, I ask that the County Committee reject the petition.

Sincerely,

A handwritten signature in black ink that reads "Rick C. Zbur". The signature is fluid and cursive, with the first name "Rick" and last name "Zbur" clearly legible.

RICK CHAVEZ ZBUR
Assemblymember, 51st District
Democratic Caucus Chair of the California Assembly

From: Penelope O <helloopenelopeo@gmail.com>
Sent: Wednesday, March 26, 2025 2:29 PM
To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>
Subject: SMMUSD- MALIBU separation!

Hello! I am a new parent to the district from out of state. I registered my children the first day back in January from winter break. My children attend Malibu Elementary and Malibu Middle. I am FOR the separation. I was absolutely appalled at how the Santa Monica and Malibu Unified School District dealt with Malibu and its students during the Palisades Fires. We were put on the back burner. Left with no schooling or instruction. And when my children finally were able to attend school on January 21st they went to school with no power basically leaving the teachers unable to teach. How is this okay? How is this possible? You later then decide to send generators that we could not even use. I also just don't understand how a city far away from us can possibly manage our schools in MALIBU and dictate when and when we cannot attend school bc of weather. It would have made better sense to be a part of Las Virgenes School District than Santa Monica!! The logic behind being a unified school district makes no sense GEOGRAPHICALLY. Not only that, fiscally, Santa Monica gladly takes all of Malibu's funds and has a grand time building new structures and funding programs for their benefit and they throw us a bone. I am absolutely against unification. I decided to make the move to Malibu after hearing of an agreement of separation to then now hear that there might not be because Santa Monica would lose money because they wouldn't get access to our funds just sounds like the most selfish and greediest thing ever. Our kids don't have enough! Our schools, our children, Malibu deserve better!!!!!! How is this okay?! In what world do we live in that this sits well with anyone? We demand a separation from Santa Monica!!!! MALIBU UNIFIED SCHOOL DISTRICT!!!!!!!!!!!!!!

Best,

Penelope O

From: Leslie Loughlin <lesliannepps@mac.com>
Sent: Wednesday, March 26, 2025 2:41 PM
To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>
Subject: Malibu Petition – oppose

Agenda Item: Malibu Petition
Meeting Date: April 2, 2025

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent in SMMUSD.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Leslie Loughlin
(310) 428-3566

Sent from my iPad

From: Marielle Hadid <hadidmarielle@gmail.com>
Sent: Wednesday, March 26, 2025 2:45 PM
To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>
Subject: Malibu

Dear Ms. Bernstein,

The time for change is now. I am writing to request the board allow this petition to go to the State Board of Education for approval.

As a parent of two children—one at MES and one at MMS—and as a PTA board member, I am deeply concerned about the number of missed school days this year. Along with lack of power and other resources. The safety and wellbeing of our children is at stake. Malibu deserves autonomy in making decisions that affect our students, staff, and community. Santa Monica-Malibu USD has fallen short in providing the necessary support for quality education.

It's time for Malibu to have its own district—one that truly understands and prioritizes the needs of our community.

Kind regards,

Marielle Hadid

Marielle Hadid
New Cell # 310.592.9258
MarielleHadid@gmail.com

Sent from my iPhone 📱

Please excuse brevity. Thank you!

From: Heather Epps <heatherepps@mac.com>
Sent: Wednesday, March 26, 2025 2:55 PM
To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>
Subject: Please DENY the original 2017 Malibu Petition

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am an SMMUSD parent, PTSA executive board member and on staff at the Ed Foundation.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, **I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.**

Sincerely,

Heather Bowles-Epps

Heather Epps

310.780.0145 cell

heatherepps@mac.com

(she her hers)

From: Brent Wagner <brentwag@gmail.com>

Sent: Wednesday, March 26, 2025 3:07 PM

To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>

Subject: Malibu unification proposal - comment / opposition

Hello,

This comment is regarding the pending meeting related to the Malibu unification proposal. As someone who was born in Santa Monica and also a current resident with two elementary school aged children, I am concerned about Malibu's petition. Please consider further mediation instead of any immediate approvals. The current proposal is not equitable for our community.

Thank you,

Brent Wagner

From: Ali Moses <alimoses11@gmail.com>

Sent: Wednesday, March 26, 2025 3:10 PM

To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>

Subject: Urgent: Vote on Malibu's Petition for Separation from SMMUSD

Dear LACOE County Committee,

I am writing to urge you to **vote on Malibu's petition to separate from SMMUSD on April 2nd and avoid further delay**. This is a **critical moment** for our community, and we cannot afford to wait any longer. The **feasibility study** conducted for Malibu is accurate and clearly demonstrates that two separate districts are not only possible but sustainable. **Malibu has proposed a fair and generous tax revenue sharing model** that ensures **ALL students—both in Malibu and Santa Monica—will continue to receive at least the same level of funding they do now**. The financial viability of this separation is not in question.

We **do not** need to wait for the District to vote on the agreements. **SMMUSD has had months to act but has repeatedly failed to do so**. Their continued delays only highlight that this is not a priority for them the way it is for us. Malibu families need to move forward so that we can **rebuild our schools and create a district that meets the specific needs of our students and community**. Postponing a vote will not change the District's inaction—it will only continue to stall Malibu's ability to establish a school system that prioritizes its own students.

I implore you to **approve Malibu's petition and adopt the revenue-sharing terms outlined in its feasibility study**. This is our chance to move forward to the **State Board of Education** for final review and ensure that Malibu's students finally get the local representation and educational structure they deserve. Please do not let unnecessary delays stand in the way of this long-overdue decision.

Malibu's children, families, and future depend on your leadership. **The time to vote is now.**

Sincerely,

Ali Moses

MES PTA Board Member

Malibu Community Members since 2020

From: nicole faries <cali.faries@gmail.com>

Sent: Wednesday, March 26, 2025 3:20 PM

To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>

Subject: City of Malibu 2017 Unification Petition - Oppose

Dear Ms. Bernstein,

Please find attached my letter in Opposition to the City of Malibu 2017 Unification Petition. The letter outlines my reasons for opposing the petition.

Thank you for the consideration.

Sincerely,

Nicole Faries
310-387-6645

March 26, 2025

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

Re: City of Malibu 2017 Petition for Unification: April 2, 2025 Meeting

Dear Committee Members,

I am writing to you as a Steering Committee member of CEPS (Community for Excellent Public Schools) and a Santa Monica parent of 2 SMMUSD Graduates and one current SMMUSD student. I have worked on behalf of the Santa Monica Malibu schools for many years and have become very familiar with this issue of Malibu Unification.

With that in mind, I am not opposed to Malibu unification out right. HOWEVER, I do **oppose** the current (not-so current) petition from the City of Malibu that is before you today.

This petition is problematic for several reasons. First, this is the same petition submitted in 2017 and your committee rejected it before.

Secondly, your committee clearly stated that the petition did not meet the 9 criteria required of a school district in 2017. Re-submitting the same petition now, necessarily means that the petition still does not meet those criteria.

The most important reason to oppose the City of Malibu petition is the fact that it is not fair or equitable to Santa Monica public schools. This petition would leave Santa Monica public schools and it's students in a serious financial disadvantage. The Santa Monica schools service more children than the Malibu schools do currently. Not only is the student population in Santa Monica schools larger, it is a more diverse population that has a wider variety of needs to address. Granting this petition would severely hinder a Santa Monica school district in addressing the needs of its students and therefore fail in its mission as school district to educate and prepare children. We must remember that it is the children of the Santa Monica community that will be negatively impacted by fewer teachers, programs and services if the petition is granted.

SMMUSD and the City of Malibu were on the verge of a final agreement in late 2024, when the Malibu side walked away from negotiations. **Please deny this petition from the City of Malibu and urge both parties to return to the table to finish a fair and equitable final agreement.**

Sincerely,

Nicole Faries
310-387-6645
Cali.Faries@gmail.com

From: Erika Bell <erikabell@rocketmail.com>

Sent: Wednesday, March 26, 2025 3:21 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: The City of Malibu 2017 Unification Petition – Oppose

Dear Members of the LA County Committee on School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent in SMMUSD and, while I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I **do not** support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Take care,

Erika Bell

erikabell@rocketmail.com

602-793-6464

From: Grace Lanzetta <gracelanzetta@yahoo.com>
Sent: Wednesday, March 26, 2025 3:39 PM
To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>
Subject: Please deny Malibu Petition (Public comment)

March 26, 2025
Grace Lanzetta
773-391-0349

Agenda item: Public comment towards Denial of 2017 Petition
RE: April 2, 2025 meeting

Dear Members of the LA County Committee for School District Organization

My name is Grace Lanzetta. I am the parent of two children with IEP's in SMMUSD and a Co-Chair of the Special Education District Advisory Committee. I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Lacking a mediated outcome, I ask you to deny this unfair and inequitable petition.

Bullet point issues:

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Grace Lanzetta

Co-Chair of SMMUSD SEDAC

From: Derek Wilson <derekcwilson@gmail.com>
Sent: Wednesday, March 26, 2025 3:45 PM
To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>
Cc: Kendra Wilson <kkendrawilson@gmail.com>
Subject: From the Palisades to Malibu....

My name is Derek Wilson, my wife Kendra and our two children just moved here from the Palisades in January. We have a child in TK and 1st grade and one more on the way. Our first month here after going through the Palisades fires was not ideal, with consistent school closures, and no stability. We were seriously questioning our decision to move here. Our children needed very badly to be in school, they already lost so much and the toll of not being in school was becoming obvious. Kendra and I both grew up in Malibu and graduated from Malibu High School. I can remember my parents talking about how the district badly needed to separate, but it's never more clear to me how important it is today. This has been going on for decades now, it's just mind blowing that this has not happened yet. Please for the love of god, vote for yes to finally make this happen. As parents we only want the best for our children's education, safety and community.

Sincerely,

Derek, Kendra, Roland and Honey Wilson.
Derek C Wilson
310/995/7042

From: Claudia Seizer <ilove4xys@gmail.com>

Sent: Wednesday, March 26, 2025 3:52 PM

To: Bernstein_Victoria <bernstein_victoria@lacoed.edu>

Subject: In lieu of an item number: The City of Malibu 2017 Unification Petition – oppose

Dear Members of the Los Angeles County Committee for School District Organization,

I am writing today as a long-time leader in SMMUSD school-affiliated organizations and site governance. My 2 older boys attended and graduated from our local Santa Monica-Malibu schools, and I have my youngest at SAMOHI as a junior. Since 1995, as a volunteer, I have supported programming that serves our SMMUSD schoolchildren and their families, with a focus on student well being, free arts experiences for all, and equitable outcomes.

It is for the sake of *these* students in particular that I am writing to ask the Committee to deny (once again) the original 2017 Petition submitted by the City of Malibu to divide SMMUSD.

It is surprising that the Committee has been called upon once again to consider Malibu's 2017 Petition, particularly since the mediation process' agreements are near finalization. This Petition's funding formula, if approved, would bring about inequitable outcomes—deep budget cuts, reduced staffing and programming, and jeopardized delivery of services, that would disproportionately harm students attending Santa Monica schools for decades. Santa Monica's Special Education students, at risk students, and English learners would be most negatively affected if this Petition is approved.

I am not against Malibu's unification, *but it must be accomplished with equity and with a continuation of services in both educational communities*; both new districts should be funded to offer similar services and staffing from the very start. The Petition submitted by the City of Malibu does not adequately provide necessary protections for SMMUSD's most vulnerable students.

Instead, the unification's mediation process *does* continue to offer an amicable and efficient path—one that allows the two agencies to get there *together*, considers the needs of *all* district students, and ensures that fairness and sustainability will be prioritized. *This* is how an equitable unification will be realized.

In conclusion, I do not support the original 2017 Malibu Petition. At your meeting on April 2, 2025, I ask you to deny this Petition. Thank you for your consideration.

Sincerely,

Claudia Seizer

20 year parent in SMMUSD

From: Soloff, Michael <Mike.Soloff@mto.com>

Sent: Wednesday, March 26, 2025 3:52 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoecoe.edu>

Cc: Denny Zane <dennyzane@aol.com>

Subject: April 2 Meeting of County Committee re Malibu Petition for Unification of SMMUSD

Please find attached the current and prior correspondence of Santa Monica's for Renters' Rights opposing Malibu's unification petition. Please make these materials available to the Committee and include in your record. Thank you.

Michael Soloff

Co-Chair

Santa Monica's for Renters' Rights



April 9, 2021

Sent via e-mail and U.S. mail

Los Angeles County Committee on School District Organization
Octavio Castelo, Secretary to the County Committee
9300 Imperial Highway
Downey, CA 90242
Castelo_Octavio@lacoe.edu

Dear Los Angeles County Committee on School District Organization members:

We are writing to register the strong opposition of Santa Monicans for Renters Rights (“SMRR”) to the City of Malibu’s pending petition to withdraw from the Santa Monica-Malibu Unified School District (“SMMUSD”), and to form a separate Malibu school district. By this petition, Malibu seeks to withdraw its financial support from the more diverse student population in Santa Monica, a population that likely will become increasingly more diverse in the future. Malibu instead proposes to use its resources to create a district with a largely non-diverse student population that will benefit from much higher per student funding and expenditure levels. At this moment when the murder of George Floyd serves as a clarion call for all of us to proactively combat the continuing effects of systemic racism, SMRR urges you to reject Malibu’s inequitable petition.

There is no dispute that the portion of SMMUSD student population currently residing in Santa Monica is far more diverse than the portion residing in Malibu—less than half of the current SMMUSD students residing in Santa Monica are “White” (47.2%), while close to four-out-of-five current SMMUSD students residing in Malibu are “White” (78.4%).¹ This difference is not simply the result of chance. As the Lawyers’ Committee for Civil Rights Under Law points out in its April 2020 assessment of fair housing in Santa Monica,² the high cost of housing in the West Los Angeles area (including Santa Monica) disproportionately prices out “those who are . . . Black, Hispanic, and with larger families.”³ However, with SMRR’s strong backing over the last 40+ years:

¹ See SMMUSD, *Frequently Asked Questions: Malibu Unification (Separation)* (“SMMUSD FAQs”) at 6, available at <https://www.smmusd.org/unificationFAQ>.

² See 4/1/20 City of Santa Monica Housing and Economic Development and the Lawyers’ Committee for Civil Rights Under Law, *ASSESSMENT OF FAIR HOUSING City of Santa Monica* (“SM AFH Report”) at 1 (“The City of Santa Monica’s Assessment of Fair Housing (AFH) is a thorough examination of structural barriers to fair housing choice and access to opportunity for members of historically marginalized groups protected from discrimination by the federal Fair Housing Act (FHA).”), available at https://www.smgov.net/uploadedFiles/Departments/HED/Housing_and_Redevelopment/Affordable_Housing/Reports/FinalAFH_04_01_2020.pdf.

³ SM AFH Report at 133

The City of Santa Monica has enacted numerous policies to prevent displacement and increase the supply of affordable housing, including rent control, just-cause eviction, anti-tenant harassment laws, source of income protections, and anti-discrimination laws that afford protections beyond the federal Fair Housing Act and the California Fair Employment and Housing Act. Santa Monica has also enacted mandatory inclusionary housing and spends significant local resources on affordable housing creation and rental subsidies. Santa Monica also has among the highest [Section 8 voucher] exception payment standards in the country, and is undoubtedly implementing more programs to address its fair housing needs than other actors in the region. These actions have resulted in a drastically expanded [affordable] housing stock in the City.⁴

Indeed, “[t]he City of Santa Monica provides most of the affordable housing in the West Los Angeles area.”⁵

For purposes of assessing Malibu’s petition, it also is relevant to consider the likely future diversity among the student populations that will reside in Santa Monica and will reside in Malibu. Here too the likely increasing diversity of the Santa Monica student population relative to Malibu is clear. Despite the enormous challenges created by regional housing pressures, SMRR and the City of Santa Monica remain committed to expanding affordable housing opportunities. For example, at its March 30, 2021 meeting, the Santa Monica City Council directed planning staff to prioritize 100% affordable housing projects on up to 11 identified city-owned sites with high housing potential in the upcoming 2021-2029 Housing Element (a direction backed by SMRR). This public land potentially could accommodate up to as many as 7300 new affordable housing units.⁶ And, pursuant to directives of the Santa Monica City Council, city staff is about to bring back to the Council for consideration (on May 11) a plan to provide a preference for affordable housing units to former Santa Monica residents with documented proof that they, their parents, legal guardians, or grandparents were displaced from the Belmar and 10 Freeway/Pico Corridor areas of Santa Monica by eminent domain in the 1950s and 1960s (areas that had concentrations of people of color).⁷ SMRR supports the “right to return” concept, and fully anticipates the Council will vote to adopt such a plan. These and other efforts should make the student population in Santa Monica increasingly diverse.

By its petition, Malibu seeks to withdraw its financial support from this currently more diverse, and in the future increasingly more diverse, Santa Monica student population. If you allow Malibu to do so, the predominantly “White” student population in Malibu immediately will enjoy twice as high funding and expenditures per pupil as the much more diverse student population in Santa Monica will receive. After five years, the gap will grow, and the predominantly “White” student population in Malibu will enjoy 2.5 times the funding and expenditures per pupil as the increasing more diverse student population in Santa Monica will receive.⁸

⁴ SM AFH Report at 2.

⁵ SM AFH Report at 46.

⁶ See City of Santa Monica, *Summary Report on Preliminary Suitable Sites Inventory Analysis* at 9, available at http://santamonica.cityca.iqm2.com/Citizens/Detail_Meeting.aspx?ID=1293 (attachment c to Agenda Item 8.A).


⁷ See City of Santa Monica, *City Seeks Community Input on Displacement Policy Development (“Right to Return”)*, available at <https://www.santamonica.gov/righttoreturn>.

⁸ See SMMUSD FAQs at 2.

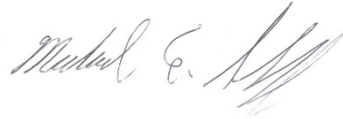
Respectfully, with the clarity born of both the murder of George Floyd and the highly unequal death toll wrought by the COVID-19 pandemic on communities of color (and most particularly on the Latinx community), you simply must conclude that such an unequal dissolution of the 150 year school partnership between Santa Monica and Malibu is inequitable and constitutes ongoing systemic discrimination against the more diverse current and future students residing in Santa Monica. Please, just say no.

Thank you for considering SMRR's views on this critical issue.

Sincerely,



Denny Zane
Co-Chair, Santa Monicans for Renters' Rights



Mike Soloff
Co-Chair, Santa Monicans for Renters' Rights



September 14, 2021

Sent via e-mail and U.S. mail

Los Angeles County Committee on School District Organization
Octavio Castelo, Secretary to the County Committee
9300 Imperial Highway
Downey, CA 90242
Castelo_Octavio@laoe.edu

Dear Los Angeles County Committee on School District Organization members:

We are writing to register the continuing strong opposition of Santa Monicans for Renters Rights (“SMRR”) to the City of Malibu’s pending petition to withdraw from the Santa Monica-Malibu Unified School District (“SMMUSD”), and to form a separate Malibu school district.¹ By this petition, Malibu seeks to withdraw its financial support from the more diverse student population in Santa Monica, a population that likely will become increasingly more diverse in the future. Malibu instead proposes to use its resources to create a district with a largely non-diverse student population that will benefit from much higher per student funding and expenditure levels. At this moment when the murder of George Floyd continues to serve as a clarion call for all of us to proactively combat the continuing effects of systemic racism, SMRR urges you to reject outright Malibu’s inequitable petition.

There is no dispute that the portion of SMMUSD student population currently residing in Santa Monica is far more diverse than the portion residing in Malibu—less than half of the current SMMUSD students residing in Santa Monica are “White” (45.4%), while close to four-out-of-five current SMMUSD students residing in Malibu are “White” (77.1%).² This difference is not simply the result of chance. As the Lawyers’ Committee for Civil Rights Under Law points out in its April 2020 assessment of fair housing in Santa Monica,³ the high cost of housing in the West Los Angeles area (including Santa Monica) disproportionately prices out “those who

¹ SMRR previously expressed its strong opposition by its letter to you dated April 9, 2021.

² See 5/21/21 School Services of California Inc., *Los Angeles County Office of Education Reorganization Financial Feasibility Study Santa Monica-Malibu Unified School District* (“SSCI Report”) at 15.

³ See 4/1/20 City of Santa Monica Housing and Economic Development and the Lawyers’ Committee for Civil Rights Under Law, *ASSESSMENT OF FAIR HOUSING City of Santa Monica* (“SM AFH Report”) at 1 (“The City of Santa Monica’s Assessment of Fair Housing (AFH) is a thorough examination of structural barriers to fair housing choice and access to opportunity for members of historically marginalized groups protected from discrimination by the federal Fair Housing Act (FHA).”), available at https://www.smgov.net/uploadedFiles/Departments/HED/Housing_and_Redevelopment/Affordable_Housing/Reports/FinalAFH_04_01_2020.pdf.

are . . . Black, Hispanic, and with larger families.”⁴ However, with SMRR’s strong backing over the last 40+ years:

The City of Santa Monica has enacted numerous policies to prevent displacement and increase the supply of affordable housing, including rent control, just-cause eviction, anti-tenant harassment laws, source of income protections, and anti-discrimination laws that afford protections beyond the federal Fair Housing Act and the California Fair Employment and Housing Act. Santa Monica has also enacted mandatory inclusionary housing and spends significant local resources on affordable housing creation and rental subsidies. Santa Monica also has among the highest [Section 8 voucher] exception payment standards in the country, and is undoubtedly implementing more programs to address its fair housing needs than other actors in the region. These actions have resulted in a drastically expanded [affordable] housing stock in the City.⁵

Indeed, “[t]he City of Santa Monica provides most of the affordable housing in the West Los Angeles area.”⁶

For purposes of assessing Malibu’s petition, it also is relevant to consider the likely future diversity among the student populations that will reside in Santa Monica and will reside in Malibu. Here too the likely increasing diversity of the Santa Monica student population relative to Malibu is clear. Despite the enormous challenges created by regional housing pressures, SMRR and the City of Santa Monica remain committed to expanding affordable housing opportunities. For example, the current draft of the 2021-2029 Santa Monica Housing Element prioritizes 100% affordable housing projects on 24 identified city-owned parcels with high housing potential. This public land potentially could accommodate close to 1900 new affordable housing units.⁷ Indeed, at its July 13, 2021 meeting, the Santa Monica City Council authorized the demolition of the existing parking structure on one such piece of public land in order to make way for affordable housing—demolition that will be paid for in part through a \$2 million federal earmark provided by Congressman Ted Lieu. At that same meeting the City Council approved a pilot program to provide a preference for affordable housing units to former Santa Monica residents with documented proof that they, their parents, legal guardians, or grandparents were displaced from the Belmar and 10 Freeway/Pico Corridor areas of Santa Monica by eminent domain in the 1950s and 1960s (areas that had concentrations of people of color).⁸ These and other efforts—all of which are supported by SMRR—should make the student population in Santa Monica increasingly diverse.

By its petition, Malibu seeks to withdraw its financial support from this currently more diverse, and in the future increasingly more diverse, Santa Monica student population. If you allow

⁴ SM AFH Report at 133

⁵ SM AFH Report at 2.

⁶ SM AFH Report at 46.

⁷ See Draft City of Santa Monica 2021-2029 Housing Element at PDF page 64, available at <https://www.santamonica.gov/media/Housing-Element-Update-2021-to-2029/Housing%20Element%20Public%20Draft.pdf>; Draft Appendix F – Report on Suitable Sites Inventory Analysis at PDF page 10, available at <https://www.santamonica.gov/Media/Housing-Element-Update-2021-to-2029/Appendix%20F%20SSI%20Report%20Final%20w%20Table.pdf>.

⁸ See July 13, 2021 Santa Monica City Council Agenda Items 3B & 8A, available at http://santamonicacityca.igm2.com/Citizens/Detail_Meeting.aspx?ID=1277.

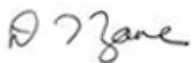
Malibu to do so, the predominantly “White” student population in Malibu immediately will enjoy almost four times as high funding per pupil as the much more diverse student population in Santa Monica will receive. Indeed, the more diverse student population in Santa Monica will face an immediate drop of more than 20% in revenue from current levels.⁹ Accordingly, the SSCI Report concludes:

The analysis clearly illustrates that the proposed reorganization would have a substantial neg[a]tive effect on the fiscal health of the remaining Santa Monica USD. The reorganization would result in significant revenue loss for the remaining district both in terms of one-time losses from the division of assets as well ongoing losses in per-ADA funding. The impact would be disproportionate given the number of students that would remain within the district as compared to the number of students that would become part of the proposed Malibu USD. The funding disparities between the two districts would be stark, and the losses that would be experienced by the remaining Santa Monica USD would undoubtedly affect the educational programs currently being offered to students within the current Santa Monica-Malibu USD.¹⁰

Respectfully, with the clarity born of both the murder of George Floyd and the highly unequal death toll wrought by the COVID-19 pandemic on communities of color (and most particularly on the Latinx community), you simply must conclude that such an unequal and deleterious dissolution of the 150 year school partnership between Santa Monica and Malibu is inequitable and constitutes ongoing systemic discrimination against the more diverse current and future students residing in Santa Monica. There is simply no reason to continue to waste the time and resources of the SMMUSD Board, or of the City Councils, civic organizations and citizens of Santa Monica and Malibu, with further consideration of this wholly unjustified and unjustifiably inequitable petition. Please, just say no.

Thank you for considering SMRR’s views on this critical issue.

Sincerely,



Denny Zane
Co-Chair, Santa Monicans for Renters’ Rights



Mike Soloff
Co-Chair, Santa Monicans for Renters’ Rights

⁹ See SSCI Report at 27.

¹⁰ SSCI Report at 30.



November 7, 2024

Sent via e-mail

Los Angeles County Committee on School District Organization
Octavio Castelo, Secretary to the County Committee
9300 Imperial Highway
Downey, CA 90242
Castelo_Octavio@lacoedu

Dear Los Angeles County Committee on School District Organization members:

We are writing to register the strong opposition of Santa Monicans for Renters Rights (“SMRR”) to the City of Malibu’s pending petition to withdraw from the Santa Monica-Malibu Unified School District (“SMMUSD”), and to form a separate Malibu school district.

This is the third time you have held hearings on this petition, and the third time we at SMRR have written to oppose the petition. Our prior two letters are attached as exhibits hereto, and we ask that you again review them. They explain in detail that, by its petition, Malibu seeks to withdraw its financial support from the more diverse student population in Santa Monica (less than half of which is white now, and which likely will become increasingly more diverse in the future). Malibu instead proposes to use its resources to create a district with a largely non-diverse student population (close to 80% white) that will benefit from much higher per student funding and expenditure levels. Given that we all have a duty to proactively combat the continuing effects of systemic racism, SMRR urges you to reject Malibu’s inequitable petition (a petition your staff previously determined fails to meet all but one of the relevant criteria for unification).

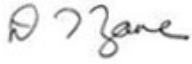
SMRR is particularly disappointed that Malibu and this Committee are pursuing this matter at this time. SMMUSD and Malibu have been in a long mediation and reportedly were close to reaching an agreement that SMMUSD, subject to successfully completing some additional due diligence as outlined in its letter to this Committee, would share with the community for its review and could recommend. Rather than allowing this process to reach a final resolution, Malibu has withdrawn from that process and pressed forward before this Committee. This is wasteful of public resources and makes no procedural sense.

Moreover, in its press release, Malibu brags that it is withdrawing financial concessions toward equity that it previously agreed to make as part of a negotiated resolution, and advises that it plans to support its petition with a new feasibility analysis. But no such new feasibility analysis has been made available to the public for review in advance of these hearings. The Committee therefore should either preclude Malibu from relying on any such feasibility analysis or postpone

these hearings until after the new feasibility analysis has been provided and both SMMUSD and the public have been given adequate time to review and comment on that analysis.

Thank you for considering SMRR's views on this critical issue.

Sincerely,

A handwritten signature in cursive script, appearing to read "D Zane".

Denny Zane
Co-Chair, Santa Monica's for Renters' Rights

A handwritten signature in cursive script, appearing to read "Michael E. Soloff".

Mike Soloff
Co-Chair, Santa Monica's for Renters' Rights



March 26, 2025

Sent via e-mail to Bernstein_Victoria@laoe.edu

Los Angeles County Committee on School District Organization
9300 Imperial Highway
Downey, CA 90242

Dear Los Angeles County Committee on School District Organization members:

We are writing to register the strong opposition of Santa Monicans for Renters Rights (“SMRR”) to the City of Malibu’s pending petition to withdraw from the Santa Monica-Malibu Unified School District (“SMMUSD”), and to form a separate Malibu school district.

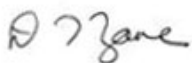
This is now the fourth time you have held hearings and meetings on this petition, and the fourth time we at SMRR have written to oppose the petition. Our prior three letters are attached to our cover email, and we ask that you again review them. They explain in detail that, by its petition, Malibu seeks to withdraw its financial support from the more diverse student population in Santa Monica (less than half of which is white now, and which likely will become increasingly more diverse in the future). Malibu instead proposes to use its resources to create a district with a largely non-diverse student population (close to 80% white) that will benefit from much higher per student funding and expenditure levels. Given that we all have a duty to proactively combat the continuing effects of systemic racism, consistent with law, SMRR urges you to reject Malibu’s inequitable petition (a petition your staff previously determined fails to meet all but one of the relevant criteria for unification).

SMRR is particularly disappointed that Malibu has continued its on-again off-again approach to working with SMMUSD to try to develop a financial agreement that fully protects all current and future students living in both Santa Monica and Malibu. All of our communities’ children are incredibly precious, and all of their lives and futures are not something to trifle with or to gamble. SMMUSD advises that it shortly will vote on the proposal that the parties had been developing, and it behooves this Committee—which I understand has until June to act—to wait for the outcome of that vote.

We further are extremely concerned that Malibu is seeking to turn the funds being raised from the recently passed voter-initiative Santa Monica Measure GS from its purpose of improving the educational experience of all SMMUSD students to a funding mechanism merely to maintain existing educational opportunities upon Malibu’s departure. Any such result would be outrageous.

Thank you for considering SMRR's views on this critical issue.

Sincerely,

A handwritten signature in cursive script that reads "D Zane".

Denny Zane
Co-Chair, Santa Monica's for Renters' Rights

A handwritten signature in cursive script that reads "Mike E. Soloff".

Mike Soloff
Co-Chair, Santa Monica's for Renters' Rights

From: Jane Albrecht <japolitics@gmail.com>

Sent: Wednesday, March 26, 2025 4:00 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: April 2, 2025 Committee Meeting on The Separation (Unification) of SMMUSD

Dear Members of the Committee:

My name is Jane Albrecht. I have been a resident of Malibu for 12 years. Until this past January, I was President of the Malibu Democratic Club for 6 years, and remain an active member of the Board, and active Democrat. I am writing to express my full support for the separation of the Malibu and Santa Monica School Districts, and to request the LACOE's County Committee on School District Reorganization to facilitate the process as quickly as possible.

The wisdom of separating the two non-contiguous districts is widely recognized at this point. There is broad agreement in both communities that separation is both the right thing, and inevitable. Support for separation in Malibu is essentially unanimous. For the best of all involved, separation should have happened years ago. The combined district does not work well for Malibu students, parents and the community. Nor does it provide any real educational benefit for Santa Monica students.

Delaying the process only delays the point at which students in both communities will get the best from their educational system. Delay not only eats up a lot of Administrators' time; it incurs administrative and legal costs that should be spent on the children's education. Moreover, dragging out the process creates unnecessary tensions and ill will.

When a decision has been made to separate – whether it be in a marriage, a business, or as in this case, a school district – the best advice is to proceed quickly - the faster, the better. It's makes the separation cleaner, less contentious, less damaging.

There is no reason why this separation should be anything but amicable – why relations in the future should not be amicable – and why future collaboration, as and when desired, is not possible. Dragging the process out will not change the results. It will only needlessly strain relations.

It's the equivalent of a no-fault divorce. Malibu doesn't dislike Santa Monica. To the contrary, Santa Monica is our close neighbor and friend. We just need local control over our schools – something that Santa Monicans no doubt understand. They have local control over their schools, and would stand for nothing less. It's something that every community needs and should have. For more than 25 years, Malibu has had at most one (often no) representative on the School Board. No community, including Santa Monica, would find that situation acceptable, nor should they.

Local control of the schools means that the Board's full focus is on the needs of the students and parents of that community. Right now, when a Malibu problem comes up, it is on the periphery of the SMMUSD radar, because Malibu is a small, distant part of the SMMUSD District. But those problems are front and center to Malibu students and parents, and will be the focus of a Malibu Unified School District. Currently, other than the 1 School Board member who is from Malibu, SMMUSD school board members do not know Malibu, its neighborhoods, people, unique problems, needs and points of view. And we don't know our school board members. They live 21 miles (or more) away.

The non-contiguous nature of the 2 communities alone is reason for creating separate school districts, although there are many good reasons to do so. Because of the distance between the 2 communities, Malibu already has an independent K-12 pathway. Due to the extensive damage caused by the recent fire, Malibu is now largely cut off from Santa Monica, and will continue to be so for probably the better part of a year. Except for residents in the burn area who have passes to use PCH, it can take an 81-mile round trip to get from Malibu to Santa Monica.

While both cities are on the coast, and share an appreciation of the ocean and environment, the population, the topography, layout, cultures and needs of the 2 cities are dramatically different.

Santa Monica is a large city, with a population of 93,000. It offers a nice urban mix of residential communities next to large commercial districts along miles of Montana Ave, Wilshire Blvd., Santa Monica Blvd., Pico Blvd., etc. It also has 2 hospitals and several medical buildings and centers. It is also built largely on flat land, and is rarely if ever threatened with being wiped out by wildfires. Culturally, Santa Monica is city life at its best, with all its benefits.

In contrast, Malibu is a small town of c. 10,000 residents. It is rural in nature and in culture. It is 21 miles long, about 1 mile wide, tucked between mountains, parklands and ocean. It also includes some unincorporated areas. People move to Malibu, despite all its inconvenience, because they want a more rural life style. Community in Malibu is created not by its long, spread-out lay out, but by the conscious creation of fulcrums of community. Schools are one of the fulcrums of community, but in Malibu, because we don't control our schools, they are not integrated into broader Malibu life in the same way that they would be, if they were run by Malibu-ites.

Unlike Santa Monica, Malibu is also a very high-risk fire area. Fire is a fact of life here. Adults and children know what causes fires, how to prevent them, what to do in the event of a fire or an evacuation order. Because of the fire risk, Malibu has also been subject to regular preventative power outages for years. This is not something Santa Monica residents or the SMMUSD Board need to think about and be prepared for to the same degree. For example, if Malibu schools had local control, every school would have had generators long ago, so that

schools could continue to operate during power outages. Instead, our children have already lost 20 days of school this year. In Malibu, it would also make sense to ensure that all our schools can be used as evacuation centers. But you can't have an evacuation center that doesn't have back-up generators.

Some in Santa Monica suggested at one point that Malibu wanted the separation because it did not want diversity. That was an unfortunate and patently false accusation. I would not support separation if that were true. The reason that Malibu residents have been pressing for separation for over 15 years now is that our students, families and communities have not been served well by this structure.

Under SMMUSD, our facilities were allowed to become old and obsolete, and were not maintained well, even though Malibu voters had approved 2 bond measures for the improvement of all SMMUSD facilities. We had to fight SMMUSD for years to get PCB's removed from Malibu High building. The problem could have been fixed with the money SMMUSD spent on legal fees unsuccessfully fighting it. Malibu finally had to approve 2 additional bond measures devoted only for the construction and renovation of Malibu Schools to get needed updating and upgrading of our schools. Educational opportunities for our students were also not keeping pace with the demands of today's world. Principal turnover at Malibu High became alarming, and affected the quality of education at Malibu High. Because of these multiple problems, families who had sent all their children to Malibu schools all their lives, were pulling their children out of Malibu High to finish elsewhere.

After separation, no children will attend different schools than they do now, because as noted above, Malibu under SMMUSD already has an independent K-12 pathway. Malibu parents have long asked SMMUSD for a more robust permitting policy to support more diverse schools here, but permitting and recruitment has been a lower priority for SMMUSD than it is for Malibu. Malibu residents want their children raised in a diverse environment, exposed to a wide variety of people and experiences. The Malibu Unified School District will be seeking diversity. Students from other communities who want to take advantage of programs offered at the Malibu schools will be welcome. In fact, we think that we will have a stronger curriculum and better facilities than today, which will attract students from other communities.

The Malibu Unified School District is also committed to supporting its teachers, employees, their labor unions, bargaining agreements and inclusive principles.

With the Board of our schools sitting 21 miles away, it feels as if they are run by an outside entity. I live down the street from Point Dume Elementary School on Fernhill Drive. The neighborhood has always cordially accommodated the lined-up cars and school traffic, every morning and afternoon, but anytime we need the school for anything, the bureaucratic hurdles are so burdensome and slow, that as a practical matter, it is prohibitive for the neighbors. The parking lot is closed when the school is not in session. If a neighbor needs to use any of the

parking spaces for a party we may have at our house (parking is very limited on Fernhill Drive), we have to submit a form which takes 3 weeks to process – and we have to rent out the whole parking lot (which last time I checked, costs c. \$600 - \$ 700) – not just the number of spaces we need. And that's IF the permit application gets approved.

Point Dume Elementary School was originally a school with a large asphalt parking lot, in the middle of the Point Dume residential community. SMMUSD closed the school in the 1980's, after which it left the property to lay fallow. The Point Dume Community formed the Point Dume Services Community District, and leased the property from SMMUSD. The neighborhood rehabbed the building, turned it into a community center, and with extensive donations and volunteer work, they turned a large part of the asphalt parking lot into a beautiful park for the community. The Community Center and Park were used by the Boy Scouts, the Girl Scouts, Seniors, Churches, AA, and others. Classes, such as CPR classes, were offered. There were barbeques and community events in the park. After 10-12 years, SMMUSD took back over the property and re-opened it as the Elementary School that we know today. The park is used as a school playground, a very nice facility to have for the children. SMMUSD was supposed to, and originally did, keep the park open for the community on the weekends. But now the Park and the Parking Lot are fenced off. The community is not allowed to use it. The school sits in the middle of a residential community, but is no longer part of the neighborhood, nor is it a particularly friendly or welcoming neighbor, even though the neighborhood contributed mightily to the facility that it is today. There's no sense that these neighbors and this neighborhood are good to and supportive of the school, so the school should be the same kind of good neighbor. This is one example of long-distance management of our schools, cut off from the community it serves. This is also something we'd work to change with local control of our schools.

The recent fires in Malibu will not impact the ability of Malibu to run its own schools. It will not affect our ability to finance our own school district. Because Malibu, like Santa Monica, is a Basic Aid District, it will continue to get the same percentage of our local property taxes to run our schools. In addition, district and city representatives estimate that the recent fires will not have a material impact on district revenues from property taxes, because real estate taxes are based on assessed rather than market value.

Luckily, unlike Pacific Palisades, our schools were untouched by the recent horrific fires. So children in Malibu whose families lost their homes did not lose their schools. They can go back to their own school; have the support of their teachers and friends; and continue in their school-related sports and outside activities. Even though we will lose some students whose families have had to relocate to other areas while they rebuild, many of those parents will keep their children in their Malibu schools. It keeps them connected to their friends and community, while they rebuild. It does not disrupt that part of the children's life.

Change, including the separation of the 2 communities' school systems, is always a bit scary. But in this case, Santa Monica will be fine from Day One. As a Basic Aid District, Santa Monica will get the same amount of Santa Monica property tax revenues as it did before. Its tax revenues are not based on the number of students enrolled. The Santa Monica School District will lose the tax revenues from Malibu, but they will have a concurrent reduction in expenses because the cost of the schools and education in Malibu will be off their shoulders. And it costs more per student to educate a student in Malibu than it does in Santa Monica. So, the higher cost students will be off their books.

Moreover, whether the separation happens under the terms of the agreements that were negotiated between Malibu and Santa Monica last year, or the terms proposed in Malibu's petition to this body, it appears that Malibu will be required to pay Santa Monica huge sums of money for almost 20 years after separation! We will not only be paying the full cost of educating our own students; we will also be required to subsidize the Santa Monica School District for the better part of two decades. It's bizarre that the smaller, financially more limited partner has to subsidize the larger, financially stronger partner. The terms of both options are hugely imbalanced in Santa Monica's favor. Malibu has about 1/10th the population of Santa Monica, a vastly smaller number of residences and businesses, and a vastly smaller residential and commercial tax base. It's David subsidizing Goliath, to exercise a right that is fundamental.

Like most Malibu-ites, I believe that it is wrong that Malibu should have to pay any money to Santa Monica, beyond any Santa Monica facilities or equipment that we would acquire, or services that we would use. Despite the draconian "alimony" (some here do view it as extortion) that is being demanded by Santa Monica, Malibu residents support separation, because having local control over their schools, and getting their children better educational opportunities is that important to them – and they don't want this to drag on longer.

For these reasons, and more, I implore the County Committee on School District Reorganization to vote to give Malibu local control over its schools, to let Malibu form its own school district, and to do so without further delay.

Sincerely yours,

Jane Albrecht

Malibu, CA

Landline: 310 457 4592

Email: JaPolitics@gmail.com

From: Mario Cipresso <mario@cipresso.com>
Sent: Wednesday, March 26, 2025 4:03 PM
To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>
Subject: Santa Monica - Malibu Schools

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent and community member in SMMUSD.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Mario Cipresso
John Adams Middle school parent
Santa Monica HS parent

From: Jill Cipresso <jill@cipresso.com>
Sent: Wednesday, March 26, 2025 4:17 PM
To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>
Subject: Re: Please deny original petition from Malibu

I'm sorry this is after 4p, it bounced when first sent...

On Wed, Mar 26, 2025 at 3:56 PM Jill Cipresso <jill@cipresso.com> wrote:

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent and community member in SMMUSD.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Jillian Cipresso

John Adams Middle school parent

Santa Monica HS parent

From: trinedy@me.com <trinedy@me.com>

Sent: Wednesday, March 26, 2025 4:23 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: Please deny the Malibu's unification petition until a fair and equitable agreement can be met.

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent of 3 students across 2 schools in SMMUSD, a Santa Monica homeowner, taxpayer, and voter that cares deeply about my city's investment in public education. While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee. Absent a mediated outcome, **I ask you to deny this unfair and inequitable petition.**

Sincerely,

—

Trinedy Krusell

trinedy@me.com

From: Laura M. Gallant <laura.em.gallant@gmail.com>

Sent: Wednesday, March 26, 2025 4:37 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: Malibu school district petition – opposition

Dear Members of the LA County Committee for School District Organization:

I am a parent of two elementary school students in SMMUSD and I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition will negatively affect Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, impacting Santa Monica students for generations.

The concept of unification must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is **through the mediation process** where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition given the following:

- Malibu's petition was **deemed by the County Committee staff to be deficient in 8 of 9 criteria** in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. **This petition fails to support 88% of the students in the district.**
- The **teachers are not currently unified in their support** and need to be on board with any decision impacting all students.

By submitting this petition, the City of Malibu does not show a good faith commitment to an equitable unification and this effort implies other priorities.

I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Laura Gallant
Santa Monica resident
(917) 374-9198

From: Elizabeth Leggio <elizabethleggio@yahoo.com>

Sent: Wednesday, March 26, 2025 4:55 PM

To: Bernstein_Victoria <bernstein_victoria@lacoed.edu>

Subject: Malibu Petition – oppose

Dear Victoria Bernstein and Members of the LA County Committee for School District Organization,

I am writing to express my opposition to the City of Malibu's petition for unification of the Santa Monica-Malibu Unified School District (SMMUSD) as it is currently written. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan will cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent of two children - a 2nd grader and a 5th grader - at Roosevelt Elementary, part of SMMUSD.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The unification proposal as it stands would lead to an inequitable division of funding, which disproportionately benefits Malibu while leaving Santa Monica students at a severe disadvantage. As currently outlined, Malibu would receive \$27,651 per student, while students in Santa Monica would only receive \$13,759 per student. This immense contrast in funding is concerning, as it creates a significant disparity for students— including students with disabilities, English learners, and at-risk youth.

This is neither fair nor just for students in Santa Monica.

For these reasons, I respectfully ask the Los Angeles County Office of Education to deny the petition for unification in its current form. The current terms need to be revisited to guarantee that every student has access to a quality, equitable education.

Thank you for your time and consideration. I hope that you will act in the best interests of all students by denying the unification petition as it stands at the upcoming April 2, 2025 meeting.

Sincerely,

Elizabeth Leggio

773-307-6532

From: Cameron Rodriguez <cameron.rodriguez@gmail.com>

Sent: Wednesday, March 26, 2025 5:13 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: Malibu Petition – oppose

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent in SMMUSD.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Cameron Rodriguez

From: Marc Provissiero <marc@op-ent.com>
Sent: Wednesday, March 26, 2025 5:23 PM
To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>
Subject: April 2 Meeting - Public Comment

Dear County Committee,

I am a parent of a 3rd grader at Malibu Elementary School PTA. We have suffered greatly under the uncaring hand of SMMUSD. The final case presented last week by the official SMMUSD didn't even mention the notion that the merged districts were best for the students. Not once. They've conceded this point. The only point that actually matters, they conceded. All they said is that they want more money. As a parent, my heart sank. How awful. We have been decimated up here. On an island. And Santa Monica wants more money. They're \$21M in surplus. \$11 million in surplus with their fuzzy math. They're overfunded. They concede it's better for Malibu students to detach. And they want more money.

We desperately need the County Committee to split the District on April 2, and not fall for the unending rhetoric that SMMUSD will vote to do it "tomorrow." It's like a real life version of the tacky "Free Beer Tomorrow" sign posted in dive bars — except we've fallen for it for nearly 20 years as SMMUSD has promised separation is "just around the corner." No more.

SMMUSD can always choose to vote in favor of the negotiated agreement after the County Commission votes to separate. In fact, that's likely the *only* way they will ever do it.

Please do not delay the vote. On April 2, our children need you to vote to separate Malibu from an out-of-touch bureaucracy located hours away, and finally put an end to the last non-contiguous school district in California.

Thank you,

Marc Provissiero

OPE
PARTNERS
OFFICE: (323) 785-7707

From: Shaun <shaun.bell29@gmail.com>

Sent: Wednesday, March 26, 2025 9:37 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: The City of Malibu 2017 Unification Petition – Oppose

Dear Members of the LA County Committee on School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent in SMMUSD, and while I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity or protections for diverse and vulnerable students and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process, where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I **do not** support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Best Regards,

Shaun Bell

shaun.bell29@gmail.com

602-793-1555

From: Elaine Vukadinovich <E.Vukadinovich@musickpeeler.com>

Sent: Thursday, March 27, 2025 9:09 AM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: Malibu Unification Petition - Oppose - April 2, LACOE Meeting

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts, which has now, in the midst of the ongoing mediation process, been renewed. Malibu's renewed petition does not meet the criteria needed to approve a new school district and threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without adequate safeguards and ensuring an appropriate unification plan, this petition could result in funding, resource and facilities cuts, significantly and negatively impacting Santa Monica students for generations.

I am a parent of two children who both went through the SMMUSD schools from kindergarten through high school (and my son is still a senior at SAMO, with my daughter having already graduated). I have been heavily involved in the SMMUSD schools in various PTA positions and as a parent in the classroom, as well as in fundraising for various activities. The SMMUSD schools are highly regarded, provide an impressive education and opportunities for all children both academically and from an extracurricular perspective, and have been able to attract quality teachers and administrators. They have been able to offer children from all socioeconomic and diverse other backgrounds the same opportunities. Malibu has benefited greatly from this alliance and sharing of funds in the past.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of sufficient services in both communities. The petition submitted by the City of Malibu, even with the feasibility study updates, continues to not adequately address issues of financial equity, protections for diverse and vulnerable students, and still fails to meet all of the nine criteria needed to approve a new school district, criteria established by the California Department of Education. The committee's own staff report had previously determined that Malibu's petition failed to meet 8 of the 9 criteria and despite submitting a revised feasibility study, there has been no significant underlying change. That revised study seems to rely on "substantially meeting the intent" which is not, and should never be viewed, as in fact meeting, or satisfying, the criteria. The criteria would then be rendered meaningless.

The only path to a fair and equitable unification is through the ongoing mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome between Santa Monica and Malibu, I ask you to deny this unfair and inequitable petition.

Sincerely,

Elaine Vukadinovich

SMMUSD Parent

310-880-5138

From: Aleson Clarke <aleson.clarke@gmail.com>

Sent: Thursday, March 27, 2025 11:33 AM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: Malibu Petition- Oppose. - April 2 Meeting agenda item

Dear Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent and community member in SMMUSD.

While I am not opposed to the concept of unification, it must be accomplished with equity and with a continuation of services in both communities. The petition submitted by the City of Malibu does not address issues of financial equity, protections for diverse and vulnerable students, and fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria.

The only path to a fair and equitable unification is through the mediation process where the needs of all students are being considered. The agreements previously presented by the SMMUSD school board in the fall are near finalization with the required updated data and will provide for both agencies to go hand-in-hand toward accomplishing the goal of unification in a more timely, equitable and amicable manner with the blessing of the county committee.

Absent a mediated outcome, I ask you to deny this unfair and inequitable petition.

- This same petition was deemed by the County Committee staff to be deficient in 8 of 9 criteria in its own staff report.
- The mediation process was based on equity and each new district having similar services on Day One. This petition fails to support 88% of the students in the district.
- The teachers are not currently unified in their support and need to be on board with any decision impacting all students.
- Is the City of Malibu still committed to an equitable unification? By submitting this petition, it seems as if they have other priorities.

To conclude, I do not support the original 2017 Malibu Petition. Please deny it at the upcoming April 2, 2025 meeting.

Sincerely,

Aleson Clarke
424-302-2680

From: Louise Jaffe <louisecjaffe@gmail.com>

Sent: Thursday, March 27, 2025 1:02 PM

To: Bernstein_Victoria <Bernstein_Victoria@lacoed.edu>

Subject: Please deny the City of Malibu 2017 Unification Petition

1. Members of the LA County Committee for School District Organization,

I am writing to ask you to deny the original 2017 petition submitted by the City of Malibu to divide SMMUSD into two districts. Malibu's petition threatens Santa Monica students with deep budget cuts, fewer programs, and lasting uncertainty. Without safeguards, this plan could cut funding, resources, and facilities, negatively impacting Santa Monica students for generations.

I am a parent, former elementary, high school, and council PTA President, former co-chair of Community for Excellent Public Schools, and former Santa Monica College Trustee. I have spent my adult life striving to make our public school systems better for all students. And here in Santa Monica Malibu, we have done a good job.

I am not opposed to the concept of unification IF it can be accomplished without harming students in either community. The petition submitted by the City of Malibu comes up short. It fails to meet the nine criteria needed to approve a new school district. Your own staff report determined that this petition failed to meet 8 of the 9 criteria! So, why would you approve it now?

We are living in challenging and unpredictable times. Now, more than ever, the best path to an acceptable unification is through a mediation process where the needs of all students are considered. Please do not short-circuit the mediation process. It has been making progress.

For all of the above reasons, I urge you to respect your staff's analysis that the City of Malibu petition fails to meet the necessary criteria for unification. Please deny it.

2. Thank you for your service,

3. Louise Jaffe

From: judyabdo@gmail.com <judyabdo@gmail.com>
Sent: Friday, March 28, 2025 1:05 PM
To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>
Subject: Please deny the 2017 Malibu unification petition

Dear Committee Members,

I ask you to deny Malibu's 2017 Unification Petition at your April 2 meeting. As a former educator, Santa Monica City Council member and Mayor, I'm concerned that the petition will disadvantage our most vulnerable students.

I urge you to direct SMMUSD and Malibu to continue their effort to work out a unification plan that protects every student, teacher, and school from inequity, and meets all of the criteria for successful unification. Transparency and the willingness to talk out differences will reassure our diverse community that providing an excellent education to every student is a priority.

Judy Abdo

From: Ted Winterer <tedwinterer@gmail.com>

Sent: Friday, March 28, 2025 2:52 PM

To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>

Subject: 4/2/25 meeting: City of Malibu 2017 Unification Petition – Oppose

Dear Members of the LA County Committee for School District Organization,

As you are aware, the current administration in D.C. has cut funding for the Department of Education and proposed eliminating the Department entirely. Cuts to Title I funding would impact only the schools within Santa Monica that receive these dollars -- there are none in Malibu. Teacher training grants have also been on the chopping block. And the Federal administration is investigating the CA Department of Education and threatening to withhold billions of dollars allocated to offset the impacts of poverty and student disabilities.

Next up? A likely move towards school choice vouchers, which would further impact public schools in our states.

So I submit that now is not the time to approve a unification proposal, unilaterally submitted by the City of Malibu, that would leave a Santa Monica district in a weaker financial condition, even without the spectre of cuts to Federal funds.

You will hear from others that the petition does not meet 8 of 9 criteria, doesn't equitably redistribute shared resources and would negatively impact the next generation of Santa Monica students. I agree with these and all the other objections to the Malibu petition. In addition, I believe that given the pressures on our schools emanating from Washington D.C. now is the time for mediation and compromise, not a one-sided take it or leave it approach. We can do better by listening and talking rather than drawing a line in the sand and refusing to budge.

I support Malibu's right to pursue its own independent school district, but not under the terms proposed for your review. Consequently, I urge you to deny this petition and allow SMMUSD and Malibu to finish the mediation process in which so much time and effort has already been invested.

Sincerely,

Ted Winterer

Samohi parent and co-chair of Community for Excellent Public Schools
(310) 963-9414

--

Ted Winterer

Realtor @Compass, 2115 Main Street Santa Monica
DRE #02047989

From: Tom Larmore <trlarmore@gmail.com>

Sent: Friday, March 28, 2025 4:24 PM

To: Bernstein_Victoria <Bernstein_Victoria@laoe.edu>

Subject: Malibu Petition for Unification

Members of the Committee:

I have been carefully following the efforts by Malibu to leave the Santa Monica Malibu Unified School District for many years and have analyzed the financial aspects of such a separation over several iterations. I strongly favor the idea of unification - in fact, the sooner, the better. However, I am extremely skeptical of the current proposal and will be very interested in reviewing the work to be done by School Services. At this point, I urge you not to approve this petition because (a) it is an effort to directly circumvent the mediation process which was close to completion before Malibu walked away, (b) you do not have the information you need from School Services which I hope will give you some professional guidance, and (c) the discussions in the Petition of the various financial arrangements is cursory at best leaving many open questions.

Tom Larmore
Santa Monica