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Return of Organization Exempt From Income Tax

2009

Open to Public Inspection

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

Department of the Treasury
Internal Revenue Service

The organization may have to use a copy of this return to satisfy state reporting requirements.

A For the 2009 calendar year, or tax year beginning July 1, 2009, and ending June 30, 2010

- B** Check if applicable:
 Address change
 Name change
 Initial return
 Terminated
 Amended return
 Application pending

Please use IRS label or print or type. See Specific Instructions.

C Name of organization San Gabriel Educational Foundation
 Doing Business As SEF
 Number and street (or P.O. box if mail is not delivered to street address) P.O. Box 1175 Room/suite
 City or town, state or country, and ZIP + 4 San Gabriel, CA 91778

D Employer identification number 95-4023144
E Telephone number (626) 451-5465
G Gross receipts \$

F Name and address of principal officer:

H(a) Is this a group return for affiliates? Yes No
H(b) Are all affiliates included? Yes No
 If "No," attach a list (see instructions)

I Tax-exempt status: 501(c) (3) (insert no.) 4947(a)(1) or 527

J Website: www.sef4schools.com

H(c) Group exemption number ▶

K Form of organization: Corporation Trust Association Other ▶

L Year of formation: 1986

M State of legal domicile: CA

Part I Summary

1 Briefly describe the organization's mission or most significant activities: Provides financial assistance to schools in the San Gabriel Unified School District. Grants are given to teachers, schools, and enrichment programs.

2 Check this box if the organization discontinued its operations or disposed of more than 25% of its net assets.

3 Number of voting members of the governing body (Part VI, line 1a)	3	<u>28</u>
4 Number of independent voting members of the governing body (Part VI, line 1b)	4	<u>28</u>
5 Total number of employees (Part V, line 2a)	5	<u>0</u>
6 Total number of volunteers (estimate if necessary)	6	<u>50</u>
7a Total gross unrelated business revenue from Part VIII, column (C), line 12	7a	<u>0</u>
7b Net unrelated business taxable income from Form 990-T, line 34	7b	<u>0</u>

	Prior Year	Current Year
8 Contributions and grants (Part VIII, line 1h)	<u>18,379.70</u>	<u>25,320.66</u>
9 Program service revenue (Part VIII, line 2g)	<u>51,980.00</u>	<u>132,656.50</u>
10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	<u>779.84</u>	<u>827.50</u>
11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	<u>21,625.04</u>	<u>0</u>
12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	<u>92,764.58</u>	<u>158,804.66</u>
13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)	<u>72,029.40</u>	<u>82,561.86</u>
14 Benefits paid to or for members (Part IX, column (A), line 4)	<u>0</u>	<u>0</u>
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	<u>0</u>	<u>0</u>
16a Professional fundraising fees (Part IX, column (A), line 11e)	<u>0</u>	<u>0</u>
b Total fundraising expenses (Part IX, column (D), line 25) ▶	<u>7,022.37</u>	<u>8,933.83</u>
17 Other expenses (Part IX, column (A), lines 11a–11d, 11f–24f)	<u>79,051.76</u>	<u>91,495.69</u>
18 Total expenses. Add lines 13–17 (must equal Part IX, column (A), line 25)	<u>73,730.82</u>	<u>67,309.25</u>
19 Revenue less expenses. Subtract line 18 from line 12		
	Beginning of Current Year	End of Year
20 Total assets (Part X, line 16)	<u>123,918.19</u>	<u>190,949.44</u>
21 Total liabilities (Part X, line 26)		
22 Net assets or fund balances. Subtract line 21 from line 20	<u>123,918.19</u>	<u>190,949.44</u>

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here
 Signature of officer: Patricia J. Freeman Date: 1 October 26, 2010
 Type or print name and title: Patricia J. Freeman, SEF President

Paid Preparer's Use Only
 Preparer's signature: _____ Date: _____ Check if self-employed Preparer's identifying number (see instructions): _____
 Firm's name (or yours if self-employed), address, and ZIP + 4: _____ EIN: _____ Phone no.: () _____

May the IRS discuss this return with the preparer shown above? (see instructions) Yes No

SCANNED NOV 16 2010

Activities & Governance

Revenue

Expenses

Net Assets or Fund Balances

44

Part III Statement of Program Service Accomplishments

1 Briefly describe the organization's mission:

Provide financial support to San Gabriel Unified School District through grants to teachers, schools, and enrichment programs.

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? Yes No

If "Yes," describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes No

If "Yes," describe these changes on Schedule O.

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 50,880.32 including grants of \$ 50,880.32) (Revenue \$)

SEF funded 50 requests for educational grants to provide educational enrichment projects for eight schools in the San Gabriel Unified School District.

4b (Code:) (Expenses \$ 31,681.54 including grants of \$) (Revenue \$)

SEF served as a conduit for funding the 2009 San Gabriel Unified School District Summer School Enrichment Program.

4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services. (Describe in Schedule O.) (Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses ▶ 82,561.86

Part IV Checklist of Required Schedules

		Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A	X	
2	Is the organization required to complete Schedule B, Schedule of Contributors?		X
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I		X
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities? If "Yes," complete Schedule C, Part II		X
5	Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If "Yes," complete Schedule C, Part III		X
6	Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I		X
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II		X
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III		X
9	Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV		X
10	Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If "Yes," complete Schedule D, Part V		X
11	Is the organization's answer to any of the following questions "Yes"? If so, complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable		X
	• Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI.		
	• Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII.		
	• Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII.		
	• Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX.		
	• Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.		
	• Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48? If "Yes," complete Schedule D, Part X.		
12	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI, XII, and XIII.		X
12A	Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," completing Schedule D, Parts XI, XII, and XIII is optional.		X
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E		X
14a	Did the organization maintain an office, employees, or agents outside of the United States?		X
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? If "Yes," complete Schedule F, Part I		X
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If "Yes," complete Schedule F, Part II.		X
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If "Yes," complete Schedule F, Part III		X
17	Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I		X
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II		X
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III		X
20	Did the organization operate one or more hospitals? If "Yes," complete Schedule H		X

Part IV Checklist of Required Schedules (continued)

	Yes	No
21 Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II.</i>	X	
22 Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III.</i>		X
23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J.</i>		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25.</i>		X
24b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		X
24c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		X
24d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		X
25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I.</i>		X
25b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I.</i>		X
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II.</i>		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III.</i>		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
28a A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV.</i>		X
28b A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV.</i>		X
28c An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV.</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M.</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M.</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I.</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II.</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I.</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1.</i>		X
35 Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2.</i>		X
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2.</i>		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI.</i>		X
38 Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? Note. All Form 990 filers are required to complete Schedule O.		X

Part V Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable		
1b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
1c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?		
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
2b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)		
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
3b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O		
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
4b	If "Yes," enter the name of the foreign country: See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
5b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
5c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?		X
6b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7 Organizations that may receive deductible contributions under section 170(c).			
7a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
7b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
7c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		
7d	If "Yes," indicate the number of Forms 8282 filed during the year		
7e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		
7f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		
7g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		
7h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		
9a	Sponsoring organizations maintaining donor advised funds. Did the organization make any taxable distributions under section 4966?		
9b	Did the organization make a distribution to a donor, donor advisor, or related person?		
10 Section 501(c)(7) organizations. Enter:			
10a	Initiation fees and capital contributions included on Part VIII, line 12		
10b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities		
11 Section 501(c)(12) organizations. Enter:			
11a	Gross income from members or shareholders		
11b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
12b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year.		

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Section A. Governing Body and Management

		Yes	No
1a	Enter the number of voting members of the governing body		
1b	Enter the number of voting members that are independent		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		X
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		X
4	Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?		X
5	Did the organization become aware during the year of a material diversion of the organization's assets?		X
6	Does the organization have members or stockholders?	X	
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	X	
7b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	X	
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
8a	a The governing body?	X	
8b	b Each committee with authority to act on behalf of the governing body?	X	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O		X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

		Yes	No
10a	Does the organization have local chapters, branches, or affiliates?		X
10b	b If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?		
11	Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?		X
11A	Describe in Schedule O the process, if any, used by the organization to review this Form 990		
12a	Does the organization have a written conflict of interest policy? If "No," go to line 13	X	
12b	b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
12c	c Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done		X
13	Does the organization have a written whistleblower policy?		X
14	Does the organization have a written document retention and destruction policy?		X
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
15a	a The organization's CEO, Executive Director, or top management official		
15b	b Other officers or key employees of the organization		
If "Yes" to line 15a or 15b, describe the process in Schedule O. (See instructions.)			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
16b	b If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?		

Section C. Disclosure

- 17 List the states with which a copy of this Form 990 is required to be filed ► CA
- 18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.
 Own website Another's website Upon request
- 19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public
- 20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ► Les Feder, 8347 Santa Ynez, San Gabriel, CA 91775

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
N/A										
1b Total										

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization

	Yes	No
3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual		
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual		
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If "Yes," complete Schedule J for such person		

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization.

(A) Name and business address	(B) Description of services	(C) Compensation
N/A		

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization

Part VIII Statement of Revenue

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514		
Contributions, gifts, grants and other similar amounts	1a	Federated campaigns						
	1b	Membership dues						
	1c	Fundraising events						
	1d	Related organizations						
	1e	Government grants (contributions)						
	1f	All other contributions, gifts, grants, and similar amounts not included above	25,320.66					
	g	Noncash contributions included in lines 1a-1f: \$						
	h	Total. Add lines 1a-1f		25,320.66				
Program Service Revenue	2a	Summer School Enrichment	Business Code 90099	132,656.50				
	b							
	c							
	d							
	e							
	f	All other program service revenue						
	g	Total. Add lines 2a-2f						
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)		827.78				
	4	Income from investment of tax-exempt bond proceeds						
	5	Royalties						
	6a	Gross Rents	(i) Real					
			(ii) Personal					
	b	Less: rental expenses						
	c	Rental income or (loss)						
	d	Net rental income or (loss)						
	7a	Gross amount from sales of assets other than inventory	(i) Securities					
			(ii) Other					
			b	Less: cost or other basis and sales expenses				
			c	Gain or (loss)				
	d	Net gain or (loss)						
	8a	Gross income from fundraising events (not including \$ of contributions reported on line 1c). See Part IV, line 18	a					
	b	Less: direct expenses	b					
c	Net income or (loss) from fundraising events							
9a	Gross income from gaming activities. See Part IV, line 19	a						
b	Less: direct expenses	b						
c	Net income or (loss) from gaming activities							
10a	Gross sales of inventory, less returns and allowances	a						
b	Less: cost of goods sold	b						
c	Net income or (loss) from sales of inventory							
Miscellaneous Revenue		Business Code						
11a								
b								
c								
d	All other revenue							
e	Total. Add lines 11a-11d							
12	Total revenue. See instructions.		26,178.44	132,656.50				

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21	82,561.86	82,561.86		
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members	-0-	-0-		
5 Compensation of current officers, directors, trustees, and key employees	-0-	-0-	-0-	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages				
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)				
9 Other employee benefits				
10 Payroll taxes				
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other				
12 Advertising and promotion	6,120.76	6,120.76		
13 Office expenses	2,100.07	2,100.07		
14 Information technology				
15 Royalties				
16 Occupancy				
17 Travel				
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization				
23 Insurance	713.00	713.00		
24 Other expenses. Itemize expenses not covered above (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
a				
b				
c				
d				
e				
f All other expenses				
25 Total functional expenses. Add lines 1 through 24f	91,495.69	91,495.69		
26 Joint costs. Check here <input type="checkbox"/> if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X Balance Sheet

		(A) Beginning of year		(B) End of year	
Assets	1	Cash—non-interest-bearing	6,419.35	1	11,539.40
	2	Savings and temporary cash investments	117,498.84	2	179,446.04
	3	Pledges and grants receivable, net		3	
	4	Accounts receivable, net		4	
	5	Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L		6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use		8	
	9	Prepaid expenses and deferred charges		9	
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a		
	b	Less: accumulated depreciation	10b	10c	
	11	Investments—publicly traded securities		11	
	12	Investments—other securities. See Part IV, line 11		12	
	13	Investments—program-related. See Part IV, line 11		13	
	14	Intangible assets		14	
	15	Other assets. See Part IV, line 11		15	
16	Total assets. Add lines 1 through 15 (must equal line 34)	123,918.19	16	190,949.44	
Liabilities	17	Accounts payable and accrued expenses		17	
	18	Grants payable	- 0 -	18	- 0 -
	19	Deferred revenue		19	
	20	Tax-exempt bond liabilities		20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23	Secured mortgages and notes payable to unrelated third parties		23	
	24	Unsecured notes and loans payable to unrelated third parties		24	
	25	Other liabilities. Complete Part X of Schedule D		25	
	26	Total liabilities. Add lines 17 through 25	- 0 -	26	- 0 -
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.				
	27	Unrestricted net assets		27	
	28	Temporarily restricted net assets		28	
	29	Permanently restricted net assets		29	
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.				
	30	Capital stock or trust principal, or current funds		30	
	31	Paid-in or capital surplus, or land, building, or equipment fund		31	
	32	Retained earnings, endowment, accumulated income, or other funds	123,918.19	32	190,949.44
33	Total net assets or fund balances		33		
34	Total liabilities and net assets/fund balances	123,918.19	34	190,949.44	

Part XI Financial Statements and Reporting

1 Accounting method used to prepare the Form 990: Cash Accrual Other _____

If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O.

2a Were the organization's financial statements compiled or reviewed by an independent accountant?

b Were the organization's financial statements audited by an independent accountant?

c If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?

If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O.

d If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both:

Separate basis Consolidated basis Both consolidated and separate basis

3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?

b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits.

	Yes	No
2a		X
2b		X
2c		
3a		
3b		

SCHEDULE A
(Form 990 or 990-EZ)

Public Charity Status and Public Support

OMB No 1545-0047

2009

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

Name of the organization

San Gabriel Educational Foundation

Employer identification number

9514023144

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 11, check only one box.)

- 1 A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state:
- 5 An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 An organization that normally receives: (1) more than 33 1/3 % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3 % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2)**. (Complete Part III.)

- 10 An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.

- a Type I b Type II c Type III—Functionally integrated d Type III—Other

e By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).

f If the organization received a written determination from the IRS that it is a Type I, Type II, or Type III supporting organization, check this box

g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

- (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?
- (ii) A family member of a person described in (i) above?
- (iii) A 35% controlled entity of a person described in (i) or (ii) above?

	Yes	No
11g(i)		
11g(ii)		
11g(iii)		

h Provide the following information about the supported organization(s).

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col. (i) listed in your governing document?		(v) Did you notify the organization in col. (i) of your support?		(vi) Is the organization in col. (i) organized in the U.S.?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
<i>San Gabriel United School District</i>		<i>2</i>	<i>X</i>		<i>X</i>		<i>X</i>		<i>100%</i>
Total									<i>100%</i>

N/A

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
 (Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4.						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
11 Total support. Add lines 7 through 10						

12 Gross receipts from related activities, etc. (see instructions) 12

13 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

Section C. Computation of Public Support Percentage

14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2008 Schedule A, Part II, line 14	15	%

16a **33 1/3% support test—2009.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization

b **33 1/3% support test—2008.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization

17a **10%-facts-and-circumstances test—2009.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization

b **10%-facts-and-circumstances test—2008.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part IV how the organization meets the "facts-and-circumstances" test. The organization qualifies as a publicly supported organization

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions

n/a

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal year beginning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support. (Add lines 9, 10c, 11, and 12.)						

14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here**

Section C. Computation of Public Support Percentage

15 Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2008 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2008 Schedule A, Part III, line 17	18	%

19a 33 1/3% support tests—2009. If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ►

b 33 1/3% support tests—2008. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3%, and line 18 is not more than 33 1/3%, check this box and **stop here**. The organization qualifies as a publicly supported organization ►

20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ►

Part IV **Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Provide any other additional information. See instructions.

Area with horizontal dashed lines for supplemental information.

**SAN GABRIEL UNIFIED SCHOOL DISTRICT
SAN GABRIEL, CALIFORNIA**

DATE: May 26, 2009
TO: Governing Board
FROM: Susan C Parks, Ed D , Superintendent
SUBJECT: **SAN GABRIEL EDUCATIONAL FOUNDATION (SEF)
TEACHER GRANT AWARDS & OTHER SEF AWARDS
DESIGNATED BY DONORS**
PREPARED BY: Pat Freeman, SEF Board President
Katherine Martinez Kleine, SEF 2009 Grants Chairperson

*SEF pays District invoices as
they come in after July 1, 2009 -
2010.*

BACKGROUND

The San Gabriel Educational Foundation (SEF) has dedicated itself to enhancing student education and strives to build community involvement to support the San Gabriel Unified School District. This year, SEF is proud to award \$52,160.19 in grants to the schools, teachers, and staff, as well as support the visual and performing arts programs of San Gabriel Unified School District. These grants and programs will directly enrich the education of all our students.

BUDGET IMPACT

None

IMPLICATIONS FOR THE DISTRICT

Please see the attached list of 2009 SEF Grant Recipients.

SUPERINTENDENT'S RECOMMENDATIONS

Acceptance of SEF grants awarded to SGUSD schools, teachers, and staff.

Members of the Board Education
Acceptance San Gabriel Educational Foundation (SEF) Grant Awards
Page 2

San Gabriel Educational Foundation 2009 Grants

Teacher Grants

Coolidge Elementary School

Mary Ann Voltaggio Phonics Street Kit and Rigby Readers leveled books \$ 1,500.00

Del Mar High School

Yvette Villasenor Art screen printing tools and supplies \$ 1,202.80

Gabrielino High School

Marguerita Drew Digital camera lens for school newspaper \$ 729.00

Shawn Peters Digital Video Camera for of Mock Trial program \$ 1,491.07

Sadhana Desai Refrigerator for Life Skills & Independent Living class \$ 606.98

William Wong Wireless interactive pad/virtual white board \$ 333.34

Kevin McClure High-speed Digital Camera \$ 764.95

Tom Velekei Set of Battery Chargers and rechargeable batteries \$ 912.07

Terri Hopper Subscriptions to Scholastic Arts magazine \$ 447.50

Christa Schramm and Daphne Traeger Electrophoresis Gel Imaging System \$ 1,361.25

Jefferson Middle School

Bo Botts PE equipment \$ 1,498.35

Jacqueline Avakian Legos robotics kits \$ 1,500.00

Eric Forburger History Day funding for state competition \$ 1,500.00

Jennifer Trap History Day funding for county competition \$ 1,500.00

Diane Tom Microscopes and slide sets \$ 1,473.14

Alison Hussar Mock trial registration fees and case materials \$ 1,500.00

Lydia Johnston Set of digital cameras for general school use \$ 1,500.00

Laureen Steiner Set of 2009 World Book Encyclopedia \$ 1,104.86

Michael Kirkpatrick Web-based subscription to Brain POP Resource \$ 1,495.00

McKinley Elementary School

Lynn Fisher Apple MacBook for classroom teaching projects \$ 1,101.93

Alda Au-Yeung Two Dell PCs for use in Resource Classroom \$ 1,066.88

Ivonne Contreras Apple MacBook for classroom teaching projects \$ 1,101.93

Susan Christenson King Street and Rigby leveled Readers sets \$ 1,467.09

Linda Austin King Street and Rigby leveled Readers sets \$ 1,467.09

SaraJane Baumgardner Art supplies to create clay tiles for Mission project \$ 300.00

Jan Stowell Rigby reader sets \$ 1,385.28

Iraise Garcia MindWare math games \$ 758.56

Diane Tse Chair shelves for under-chair storage \$ 1,097.29

Members of the Board Education
Acceptance San Gabriel Educational Foundation (SEF) Grant Awards
Page 3

Roosevelt Elementary School

Emily Blaney	Playaway audiobooks and MP3 style players	\$ 1,473.76
Lydia Sanchez	Classroom math games and manipulatives	\$ 956.48

Washington Elementary School

Erin Pompey	Magnetic write & wipe boards and language game sets	\$ 624.14
Jennifer McGraw	Portable CD Players and batteries	\$ 356.84
Lyndsey Rozman	Portable CD Players and batteries	\$ 324.44
Janet Mazon	Circle Time carpet	\$ 524.00

Wilson Elementary School

Miriam Shin	Equipment and supplies to assist for special education	\$ 1,482.92
Eileen Mabalay	PE sports equipment and cart	\$ 957.10
Alex Herreria	Document camera projector	\$ 600.06

Total Teacher Grants \$ 40,160.19

Designated Grants

Music and Arts - SGUSD 4th grade music program with student recorders	\$ 5,000.00
GATE (Designated by Dc	\$ 1,400.00
Instructional Media Center (partial funding)	\$ 5,600.00

Total Designated Grants \$ 12,000.00

Total 2009 SEF Grants to SGUSD for Student Enrichment

\$ 52,160.19



SEF Board of Directors Meeting, Wednesday, July 1, 2009
 Freeman Home, 537 N. Gerona Ave., San Gabriel at 6 pm

NAME (Printed Please)	Hours
1. Pat Freeman	20 hrs
2. Irene Chapman	25 hrs
3. Alan Ulrix	2-
4. Leslie Fedon	20 hrs.
5. Kathie Eckstrom	10 hrs.
6. Diana Fagan	2 hrs.
7. Kirk Skelton	
8. Katherine Kline	
9. Susan + Mary Berke	
10. Lee Freeman	
11.	
12.	
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30.	

San Gabriel Educational Foundation



BOARD OF DIRECTORS MEETING AGENDA
Wednesday, July 1, 2009, 7 PM, Freeman Home

WELCOME : Pat Freeman, SEF President

MINUTES BY RECORDING SECRETARY: Irene Chapman, Recording Secretary

TREASURER'S REPORT: Les Fedor (Bills to Ratify)

CORRESPONDING SECRETARY: Diana Fagan (memos, paper & postage by Fagans)

OLD BUSINESS

SEF'S CELEBRATE AMERICA ON FRIDAY, JUNE 5, 2009, ALMANSOR COURT - OUR BEST EFFORT EVER! MANY THANKS TO THOSE WHO WORKED SO HARD!

- A. Comments and Assessments
- B. Final Report

NEW BUSINESS

DISCUSSION & RECOMMENDATIONS ON SEF's FUTURE - Pat

A. Reconstituted SEF Executive Board to remain in place **UNTIL** new director is in place - ratify?

1. Reconstituted Executive Board charged with continuing business operations through August 30, 2010 to complete Summer School Enrichment Program for 2010
 - a. Current President - Pat Freeman
 - b. Current V.P.- Jan Stowell
 - c. Current Recording Secretary - Irene Chapman
 - d. Current Treasurer - Les Fedor
 - e. Current Corresponding Secretary - Diana Fagan
 - f. Current SEF Grant Chair - Katherine Kleine
 - g. Current Board of Education/ Community Liaison - Lee Freeman

2. The existing SEF Board of Directors, having most successfully completed their terms, are released from further SEF Board obligations.

B. 2009 - 2010 Brochure to go to 23,000 households in San Gabriel in mid Oct. - Nov.?

1. As part of Vista?
2. As independent mailing through The Processors?

C. No Teacher Grants for 2009-10

D. SEF focus to help make up State budget short falls for District programs with more donor designation opportunities - Endowments & Grant Seeking

E. Continue Summer School Enrichment Program

F. Other

ADJOURNMENT:

THANK YOU FOR HELPING BUILD OUR EDUCATIONAL FUTURE!

**SAN GABRIEL EDUCATIONAL FOUNDATION
BOARD OF DIRECTORS MEETING MINUTES
WEDNESDAY, APRIL 29, 2009**

CALL TO ORDER- The meeting was called to order at 6:58 p.m. by President Pat Freeman. Pat invited those who had not yet done so, to get some food and look over the list of prospective grants
MINUTES- Pat made the correction under New Business item B Reprs Responsibilities 1 Each site.. for one \$25.00 or more. . The minutes were approved as corrected.

TREASURER'S REPORT- Les's report was current through April 28, 2009. Checking Account Balance- \$8,288.73, CD balance- \$41,425.62, Money Market Account- \$6,057.63, giving Total Assets of \$55,771.98. Total receipts to date since 7/1/08 are \$18,255.85 and Total Outflows to date are \$32,639.71. It was moved, seconded and passed that the Treasurer's Report be accepted and filed for audit. Les then asked for the ratification of four checks, #s 1171-1174, totaling \$7,309.72. In answer to a question, Les said that checks #1172-1174 were for the last of the 2008 grants. It was moved, seconded and passed that the checks be ratified.

CORRESPONDING SECRETARY- Thanks to Diana Fagan for sending the memos and furnishing the paper, printing and postage.

CURRENT BUSINESS-

- I. SEF'S Fundraiser, Friday, June 5, 2009 at Almansor Court.
 - A. Pat has set up a meeting on Monday, May 4, 2009, at Almansor Court between Kevin, Cheryl Wilson, Pat and Irene and Amy Tuckosh to finalize the menu, pricing, Auction placement and seating setups. Pat announced that she was told today that Amy is unable to meet with us; so we will meet with her manager instead.
 - B. Pat announced that event packets are ready for each site rep to pick up after the meeting in the den. Please don't leave without your packets. Distribute to your staff ASAP, please and actively encourage their participation.

II. AUCTION BASKETS-

- A. Please bring your school Fan Auction baskets, or their components, to the May 27th Workshop. We will assemble and wrap them at that time.
- B. If you, or anyone you know, wishes to donate an individual basket, please inform Pat by Friday, May 22nd, so that they may receive credit in our Event Program. These items may be brought on May 27th also, either finished or needing assembly

III. PROGRAM ADS- It would be very desirable that each site donate an ad to the Event Program.


Pat said that 1/2 page ads are \$50.00 and full page ads are \$100.00. Please encourage your staff to consider this. These ads are due Friday, May 22nd as well. If needed, Pat will generate your ad.

In answer to a question, Pat stated that if you have a group with whom you wish to be seated, let Pat know i.e. names and reservation money. Almansor Court tables seat 10, so a full table is \$650.00. If you wish a Silver Table, it is \$750.00. This includes a full page ad in the Event Program. We already have a Silver Table put together by Dave Crist and Lon Sellars. Pat stressed her request that as many as possible attend on May 27th. At this time, we need to count and collate the auction fans, put together the baskets and check the table decorations. Everything MUST be ready to go as we will probably only have a 2 HOUR window to set things up on June 5th, if there is an afternoon event before ours. We will re-use the school site 3' x 6' Artworks from last year.

Re: using TOKENS instead of coins- Jason said he sent the website address to Lee with all the information. Pat will ask Lee is he has the email in question. Les said we should move on this item as time is growing short. Jason stated that if we went for a generic design, we would be able to receive them more quickly. The motion was made and seconded that we use tokens instead of coins for the Fan Auction. The motion passed. It was decided that we would not redeem any unspent tokens. The motion was made and seconded that we look into the purchase of tokens for the Fan Auction. The motion was passed.

IV. GRANT SELECTION-

The regular Open Meeting was adjourned at 7:10 p.m.. The Grant Selection process continued in closed Session.

Respectfully submitted,

Recording Secretary

SAN GABRIEL EDUCATION FOUNDATION
YEAR END REPORT JUNE 30, 2009

CHECKING ACCOUNT BALANCE		\$ 6,419.35
CD ACCOUNT BALANCE		\$ 41,425.62
MONEY MARKET ACCOUNT BALANCE		\$ 76,073.22
TOTAL CASH ASSETS		<u>\$ 123,918.19</u>
RECEIPTS		
MEMORIAL DONATION		\$ 50.00
FUND RAISER - FAN AUCTION	\$ 1,854.25	
FUND RAISER - SILENT AUCTION	\$ 3,990.00	
FUND RAISER - LIVE AUCTION	\$ 870.00	
FUND RAISER - ADVERTISING	\$ 1,310.00	
FUND RAISER - DONATIONS	\$ 1,590.79	
FUND RAISER - PREMIUM TDABLES	\$ 5,250.00	
FUND RAISER - TICKET SALES	\$ 6,760.00	
TOTAL FROM FUND RAISER		\$ 21,625.04
INTEREST FROM CD	\$ 688.78	
INTEREST FROM CHECKING ACCOUNT	\$ 5.74	
INTEREST FROM MONEY MARKET ACCT	\$ 85.32	
TOTAL INTEREST		\$ 779.84
MEMORIAL DONATION		\$ 50.00
CAPITAL CAMPAIGN		\$ 16,254.38
MISSION CAR WASH		\$ 2,043.32
SUMMER SCHOOL ENRICHMENT PROGRAM		\$ 51,980.00
TOTAL RECEIPTS		<u>\$ 92,782.58</u>
EXPENSES		
GRANTS PAID		\$ 39,389.69
2009 FUND RAISER		\$ 4,906.50
INSURANCE		\$ 343.00
OFFICE SUPPLIES		\$ 33.87
POSTAGE AND BOX RENTAL		\$ 480.86
PRINTING		\$ 638.68
MISCELLANEOUS		\$ 619.45
SUMMER SCHOOL ENRICHMENT EXPENSES		\$ 32,639.71
TOTAL EXPENSES		<u>\$ 79,051.76</u>
LIABILITIES		
ENRICHMENT EXPENSES FOR 2009 ARE UNKNOWN AT THIS TIME.		
NOTES		
THE SUMMER SCHOOL ENRICHMENT RECEIPT AMOUNT INCLUDES MONIES FOR TWO PROGRAMS; 2008 (NET) AND 2009 (GROSS) WHICH DOES NOT ALLOW FOR THE UNKNOWN 2009 EXPENSES).		
THE MONEY MARKET FUND INCLUDES ALL 2009 ENRICHMENT RECEIPTS		
INTEREST ON THE CD WAS COMPUTED IN 10/08 AND 04/09 AND IS INCLUDED IN THE VALUE SHOWN FOR THE CD.		
THIS REPORT IS PRELIMINARY UNTIL THE STATEMENTS FROM UNION BANK ARE RECEIVED, RECONCILED, AND AUDITED.		

SAN GABRIEL EDUCATIONAL FOUNDATION

FINAL REPORT OF JUNE 5, 2009 FUNDRAISER

INFLOWS

ADVERTISING	\$ 1,310.00
FAN AUCTION	\$ 1,854.25
SILENT AUCTION	\$ 3,990.00
LIVE AUCTION	\$ 870.00
DONATIONS	\$ 1,590.79
PREMIUM TABLE + INDIVIDUAL TICKETS	\$ 12,010.00
	\$ 21,625.04

OUTFLOWS

COST OF DINNERS	\$ 4,696.66
MISCELLANEOUS	\$ 294.84
	\$ 4,991.50

PROFIT \$ 16,633.54

REPORT DATED JULY 1, 2009

CHECKS FOR APPROVAL

1171	POSTMASTER	252.00	POSTAGE & BOX RENTAL
1172	SGUSD	1615.11	GRANTS
1173	SGUSD	456.35	GRANTS
1174	SGUSD	4986.26	GRANTS
1175	LEE FREEMAN	33.87	OFFICE SUPPLIES
1176	SGUSD	545.16	GRANTS
1177	ALMANSOR COURT	3196.66	DINNER BALANCE
1178	IRENE CHAPMAN	14.70	FUNDRAISER SUPPLIES
1179	SGUSD	373.56	GRANTS
1180	LEE FREEMAN	2500.00	CASH ADVANCE FOR FUNDRAISER CHANGE
1181	VOID		
1182	LEE FREEMAN	132.09	FUNDRAISER EXPENSES
1183	LEE FREEMAN	80.92	FUNDRAISER EXPENSES
1184	CHO	85.00	REFUND - ENRICHMENT PROGRAM
1185	CORONA	160.00	REFUND - ENRICHMENT PROGRAM
1186	BAYARDO	150.00	REFUND - ENRICHMENT PROGRAM
1187	LEE	110.00	REFUND - ENRICHMENT PROGRAM
1188	CHERYL WILSON	113.56	FUNDRAISER & MISC EXPENSES



SEF Board of Directors Meeting, Thursday, July 16, 2009
Freeman Home, 537 N. Gerona Ave., San Gabriel at 6 pm

NAME (Printed Please)	Hours
1. Pat Freeman	6 hrs
2. Diana Fagon	2 hrs
3. Gene Chapman	3 hrs
4. Jan Stowell	7 -
5. Les Fedor	4 -
6. Lee Freeman	
7. Katherine Klein	
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Pat Freeman
Jan Stowell
Irene Chapman
Les Fedor

Diana Fagan
Katherine Kleime
Lee Freeman



decided to
set:

3rd Thursday
for monthly
mtgs

San Gabriel Educational Foundation

BOARD OF DIRECTORS MEETING AGENDA
Thursday, July 16, 2009, 7 PM, Freeman Home

WELCOME !

MINUTES BY RECORDING SECRETARY. Irene Chapman, Recording Secretary

TREASURER'S REPORT: Les Fedor (Bills to Ratify)

CORRESPONDING SECRETARY: Diana Fagan (memos, paper & postage by Fagans)

PRESIDENT'S REPORT: Pat Freeman

A. Research on seven Education Foundations suggested by attorney Cindy Arellano at the recommendation of Superintendent Dr. Parks

B. Productive Discussion with San Marino Schools Foundation Director Colleen Fitzpatrick

OLD BUSINESS

SUMMER SCHOOL ENRICHMENT PROGRAM - Pat

ONGOING SEARCH FOR EXECUTIVE DIRECTOR - Pat

NEW BUSINESS

DISCUSSION & RECOMMENDATIONS ON SEF's FUTURE

- A. 2009 - 2010 Brochure to go to 23,000 households in San Gabriel in mid Oct. - Nov.?
 - 1. As part of SGUSD Vista?
 - 2. As an independent mailing through The Processors?
- B. SEF focus to help make up State budget short falls for District programs with more donor designation opportunities - Endowments & Grant Seeking
- C. Prepare Documentation for Darrell Clapp to do 2008-2009 IRS Report
- D. Need Auditors Report for 2008 -2009
- E. NUCCIO Insurance Application and Renewal - Approval of \$ Liability for Directors payment due by 9/01/09 and applies through 9/01/10
- F. UPDATE LINK TO SGUSD WEB SITE WITH CURRENT INFO.

ADJOURNMENT:

HAPPY SUMMER VACATION!

NEXT SEF BOARD MEETING THURSDAY, SEPTEMBER 17, 2009

**SAN GABRIEL EDUCATIONAL FOUNDATION
BOARD OF DIRECTOR'S MEETING
WEDNESDAY, JULY 1, 2009**

Pat called the meeting to order at 7:19 p.m.

Excused absences: Jan Stowell, Cheryl Wilson, Lydia Johnston, Joan Teng, Patty Cheadle, Kevin Sawkins, and Linda Steele.

Present were: Dr. Susan Parks, Diana Fagan, Kathee Eckstrom, Katherine Kleine, Les Fedor, Kirk Shelton, Dean Viera, Lee Freeman, Pat Freeman, Irene Chapman and guest, Gary Parks.

NEW BUSINESS, TAKEN OUT OF ORDER: In reading over the Agenda, it was determined that we must make certain motions to renew the terms of Directors, reconstitute the Executive Board and amend the Bylaws in order for SEF to continue, in a modified form, at least through August 30, 2010; since the new fiscal year has begun without the election of the Executive Board and renewal of the Board of Directors' terms. The date of August 3, 2010 was chosen to cover the operations of SEF through the Summer School Enrichment classes for 2010. This is the "worst case" scenario in the event that we do not obtain an Executive Director to take over the day-to-day operations of SEF in the interim.

FIRST: Kathee made the motion that "We renew the terms of the 10 Directors present, plus Jan Stowell, who is absent." Dean seconded the motion. The motion passed unanimously. (Jan Stowell absent)

SECOND: Diana made the motion that the Executive Board be reconstituted in the following positions:

President	Pat Freeman
Vice-President	Jan Stowell
Recording Secretary	Irene Chapman
Treasurer	Les Fedor
Corresponding Secretary	Diana Fagan
SEF Grant Chair	Katherine Kleine
BOE/Community Liaison	Lee Freeman

Kathee seconded the motion. The motion was passed unanimously. (Jan Stowell absent)

THIRD: Kirk then made a motion to amend the Bylaws: specifically, Article IV, Section 1, Number of Directors, to re-establish the minimum number of required Directors as follows: "The Board of Directors shall consist of no fewer than seven (7) and no more than twenty-seven (27) individuals. Four (4) Directors shall constitute a quorum for the transaction of business until changed by an amendment to these Bylaws duly adopted in accordance with Article IX hereof." Les seconded the motion. The motion was passed unanimously. (Jan Stowell absent)

FOURTH: Les made the motion that the four Directors who are not named to the Reconstituted Executive Board: Dr. Susan Parks, Kirk Shelton, Dean Viera and Kathee Eckstrom, be removed as Directors according to Article IV, section 10 of the Bylaws. Kathee seconded the motion. The motion was passed unanimously. (Jan Stowell absent)

Pat thanked all of them for their generous and selfless service to SEF over the years. She stressed that they were welcome to attend the future SEF meetings and give their input.

FIFTH: Katherine made the motion to amend Article IV, section 2, Qualifications of Directors, to read as follows: "The Board of Directors shall be composed of up to twenty-seven members that are representatives of the schools and community that are served by the San Gabriel Unified School District." Les seconded the motion. The motion was passed unanimously. (Jan Stowell absent)

The meeting then returned to the agenda as written.

Minutes- The minutes, appended to the agenda packet, were self-read. Lon Sellers name was misspelled as Sellars. The minutes were approved with the spelling change.

Treasurer's Report- Les reported that the report was current to the year's end, 6/30/09. The Checking Account balance is \$6,419.35; the CD Account balance is \$41,425.62 and the Money Market Account balance is \$76,073.22, giving a total of cash assets of \$123,918.19. However, we have the obligation of \$52,160.19 in 2009 grants to be disbursed and the matter of Summer School Enrichment reimbursement to SGUSD for teacher salaries, lab fees and supplies. Last year, expenses for this item were approximately \$34,000.00. This year's expenses are unknown at this time, but positing an expense of about \$36,000.00, we will have expenses totaling some \$88,000.00, leaving approximately \$35,000.00 for the coming year, while we search for an Executive Director. Pat said that she will be picking up more Summer School checks from JMS (one needs to be returned to the parents). Kathee moved and Diana seconded that the Treasurer's Report be accepted. The motion was passed unanimously. (Jan Stowell absent). The Report will be filed for audit.

Pat asked that checks #1171-1188 be ratified. These checks are itemized on a list in the agenda packet. Checks #1184-1188 are refund checks to families that have withdrawn from Summer School. Pat said that this year we have had no bounced checks as we had last year. Kathee moved, and Irene seconded, that the checks #1171-1188 be ratified. Motion carried unanimously. (Jan Stowell absent)

Pat announced that, this year, under no circumstances, will we extend the time limit to order grant materials past the stated date of October 20, 2009. Katherine will send a reminder about this to the grant recipients in September.

OLD BUSINESS-

A. Assessment and comments on SEF Fundraiser, June 5, 2009:

- More people stayed until the end.
 - There was plenty of room, it was comfortable and the view was wonderful.
 - Recommend that the next Fundraiser be held there.
 - The food was very good, replenished often and a great variety of offerings. A vegetarian could find a good selection of food. Question: would it be cheaper to have a sit-down dinner? Answer: no, this buffet was cheaper.
 - Recommend that the fan auction/change table exchange places with the reception table. The manner in which the entrance doors were opened sent people to the fan/change table first.
 - Adhere strictly to FIRM last date for reservations. Too difficult to keep juggling figures on food.
 - Suggestions that there be more explanations on bid sheets of what Silent Auction items contain.
 - That there be two jars for the Fan Auction on each of the tables at Almanson Court.
 - There were no problems with the No-Host Bar, the bartenders were great as were the servers, and our Waiter Captain, Javier.
 - A better sound system would enhance things. Unless one put the mic directly in front of their mouths, the sound was either fuzzy or too soft.
 - The idea of having the teachers come and receive their grants at this time was great. Perhaps we might change the timing, though.
 - Since the school year ends sooner this next year, we should change the Fundraiser to May.
- B. Final Report is appended to the agenda packet. Our profit this year was \$16,633.54!

NEW BUSINESS-

A. Reconstituted SEF Executive Board to remain in place until the new Executive Director is in place, or failing that, until August 30, 2010.

1. This item was implemented in the second item at the beginning of these minutes.
2. This item was implemented in the fourth item at the beginning of these minutes.

If, and when, we have our new Executive Director, we can consolidate ourselves and bring in people from businesses and the community at large. We need to get to the next level- which means going for major grants and endowments. SEF's new focus will be to keep in place District programs endangered by Budget shortfalls. As stated before, the Reconstituted Executive Board will serve either as a transition team with the new Executive Director or, we will continue operations until August 30, 2010, as stated above.

B. Pat suggested we send a 2009-10 brochure. The question is: shall we send it as part of the Vista mailing, or send it ourselves through The Processors? Option one is cheaper, sending out to 23,000 households for about \$3,900.00 or sending it ourselves for about \$7,000.00 to the same target mailing list. Table this for now.

C. No teacher grants for 2010-11, unless we get an Executive Director- but the amount would be much smaller than before.

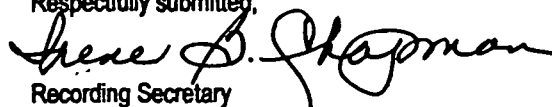
D. SEF focus on major grants and endowments- discussed above.

E. Continue Summer School Enrichment in 2010- discussed above.

F. Other: our next meeting will be on Thursday, July 16, 2009 at 7 pm at the Freeman's home.

Meeting Adjourned at 9:28 p.m.

Respectfully submitted,


Recording Secretary



SEF Board of Directors Meeting, Thursday, October 8, 2009
Freeman Home, 537 Gerona Ave., San Gabriel at 7 pm

NAME (Printed Please)	Hours
1. Irene Chapman	16 14
2. LESLIE FEDOR	16
3. Diana Fayer	2
4. Pat Freeman	24
5. Lee Freeman	2
6. Jan Stowell	3
7. Katherine Klein	4
8. _____	
9. _____	
10. _____	
11. _____	
12. _____	
13. _____	
14. _____	
15. _____	

Pal

San Gabriel Educational Foundation



BOARD OF DIRECTORS MEETING AGENDA
Thursday, October 8, 2009, 7 PM, Freeman Home

WELCOME !

MINUTES BY RECORDING SECRETARY: Irene Chapman, Recording Secretary

TREASURER'S REPORT: Les Fedor (Bills to Ratify)
Auditor at work on books?

CORRESPONDING SECRETARY: Diana Fagan (memos, paper & postage by Fagan)

OLD BUSINESS

SUMMER SCHOOL ENRICHMENT PROGRAM & BUDGET (SSSEP) REVIEW - Pat Freeman ✓

NEW BUSINESS

- A. 2009 -10 Brochure to go to 23,000 households in San Gabriel in mid Nov. - action yes
SEF focus to help make up State budget short falls for District programs with more donor designation opportunities - Endowments & Grant Seeking
 1. Processors Bid: \$ 12,000 with postage
 2. Chris Kleine of LithoLink : \$9,500 with postage - action yes
Chris, Katherine & Jason Kleine donated 10,000 SEF 2008-09 Brochures

- B. Executive Director (ED) Search based on San Marino Schools Foundation model with ED as employee of the District insures continuity of SEF for future and allows Summer School Enrichment Program to continue etc. - action yes
 1. Part time employee with salary of \$25,000 per year. Invoiced by District to SEF
 2. Salary to include partial benefits, workers compensation etc. to be worked out with Interim HR Director Janet Reese replacing Sue Naeve, Assist. Super. H R.
 3. Hiring of ED as SGUSD employee requires Board of Education approval to continue
 4. ED Job Description revised: Irene Chapman, Jan Stowell & Pat Freeman - action yes

- C. Request for funding GHS English Department Teacher Substitutes during intensive 3 day teacher assessment of English Writing Skills for all grades Partial funding \$4,500 requested by Ruth Esseln, GHS Vice Principal - action No

- D. OTHER

ADJOURNMENT:

HAPPY HALLOWEEN!



NEXT SEF BOARD MEETING THURSDAY, November 19, 2009

SAN GABRIEL EDUCATIONAL FOUNDATION
 CHECKS FOR PAYMENT APPROVAL THROUGH SEPTEMBER 30, 2009

CHECK #	AMOUNT	PAYEE	REASON
1189	\$		voided
1190	\$ 90.00	NHON	REFUND SS ENRICHMENT
1191	\$ 90.00	SAM	REFUND SS ENRICHMENT
1192	\$ 10.00	LIU	REFUND SS ENRICHMENT
1193	\$ 25.00	PHAUM	REFUND SS ENRICHMENT
1194	\$ 10.00	GONZALEZ	REFUND SS ENRICHMENT
1195	\$ 15.00	PAU	REFUND SS ENRICHMENT
1196	\$ 10.00	KWAK	REFUND SS ENRICHMENT
1197	\$ 15.00	MATCIZENKO	REFUND SS ENRICHMENT
1198	\$ 15.00	PAU	REFUND SS ENRICHMENT
1199	\$ 15.00	VILLERA	REFUND SS ENRICHMENT
1200	\$ 15.00	ZHANG	REFUND SS ENRICHMENT
1201	\$ 85.00	JEONG	REFUND SS ENRICHMENT
1202	\$ 235.00	CORREA	REFUND SS ENRICHMENT
1203	\$ 3.00	HERNANDEZ	REFUND SS ENRICHMENT
1204	\$ 2,432.44	SGUSD	2008 GRANT
1205	\$ 412.00	NUCCIO	INSURANCE
1206	\$ 6,292.82	SGUSD	2009 GRANTS
1207	\$ 28,433.72	SGUSD	SS ENRICHMENT EXPENSES
1208	\$ 2,763.73	SGUSD	SS ENRICHMENT EXPENSES
1209	\$ 12,000.00	SGUSD	IMC;GATE;4THMUSIC PROGRAM
	\$ 52,967.71		2009 GRANTS

Handwritten:
 This
 was
 Oct. 9, 2009

SAN GABRIEL EDUCATIONAL FOUNDATION				
FISCAL PERIOD JULY 1, 2009 THROUGH SEPTEMBER 30, 2009				
RECEIPTS				
	CAPITAL CAMPAIGN	\$	1,208.10	
	MISSION CAR WASH	\$	794.67	
	INTEREST 2 ACCOUNTS	\$	69.77	
	SUB TOTAL	\$	2,072.54	
	SUMMER SCH. ENRICHMENT	\$	2,943.00	
	TOTAL RECEIPTS	\$	5,015.54	
DISBURSEMENTS				
	2008 GRANT	\$	2,432.44	
	2009 GRANTS		\$18,292.82	
	INSURANCE	\$	387.00	
	SUBTOTAL		\$21,112.26	
	SS ENRICHMENT - EXPENSES		\$31,197.45	
	TOTAL DISBURSEMENTS		\$52,309.71	
BANK ACCOUNTS				
	CHECKING		\$10,253.22	
	MONEY MARKET		\$24,944.18	
	CERT. OF DEPOSIT		\$41,425.62	
	TOTAL BANK ACCOUNTS		\$76,623.02	

SAN GABRIEL EDUCATIONAL FOUNDATION
Board of Directors' Meeting Minutes
Thursday, July 16, 2009

Pat welcomed everyone and called the meeting to order at 7:10 p.m.

Present: Pat Freeman, Jan Stowell, Les Fedor, Diana Fagan, Lee Freeman, Katherine Kleine and Irene Chapman.

Minutes- The minutes were in the agenda packet that Pat distributed. It was moved by Katherine and seconded by Jan that the minutes be approved as self-read. Motion passed unanimously.

Treasurer's Report- Les did not bring a report since there were no significant changes since the last report given at the July 1, 2009 meeting. (A copy of this report is appended to the official copy of the minutes).

Corresponding Secretary- Pat thanked Diana for being so prompt, as always with the meeting memos and her generosity in paying for the postage.

PRESIDENT'S REPORT- Pat Freeman

A. Dr. Parks recommended an attorney, Cindy Arellano, as a possible resource to assist with the restructuring of SEF. Pat and Ms. Arellano spoke. She referenced seven Education Foundations that she said she had helped to set up. Pat followed up on this information- two Foundations are now dissolved and the remaining five are very small. In further investigation Pat found out that Ms. Arellano dealt only with the Administrations of the various Districts, not the Foundations themselves, directly. Her expertise is not one which we can utilize.

B. Pat spoke with former San Marino Schools Foundation (SMSF) President Earlene Cheung. She told Pat that the current Executive Director is Colleen Fitzpatrick. Pat contacted her and learned that she has a full time assistant. They are both employed by the San Marino School District (SMSD), but the San Marino Schools Foundation reimburses the District for their salaries. She sent Pat a copy of her job description. Pat will request a copy of the SMSF Bylaws. Dr. Sue Naeve, SGUSD Human Relations Director, will check with her counterpart at SMUSD, to ascertain salaries and the method of reimbursement by SMSF. Ideally, we would be able to "float" the position on the SGUSD job board. The new Executive Director would be a District employee, whose salary/benefits would be paid to the SGUSD by SEF.

OLD BUSINESS-

-The Summer School Enrichment Program is larger this year than last year. We have received approximately \$52,000 so far. Les has put these funds into our money market to make us some money until we reimburse the District for teachers' salaries and supplies. Pat has collected some more money, which she has turned over to Les.

- In order to continue our search for an Executive Director we will need to decide on a salary and write out a job description. The applicant would have to agree to be at least a half time employee to receive any benefits. Les made the motion that Pat investigate with the District's Human Resources Director whether we can "float" this position on the District's job board. Jan seconded the motion and it passed unanimously. We will need to have a job description and salary/benefits package in place. This would all have to be approved by the Board of Education.

NEW BUSINESS-

A. 2009-10 SEF brochure and capital campaign- we will revisit this in September.

B. District short falls- Lee explained that the SGUSD adopted a budget for 2009-10 that will just cover expenses as currently projected. However, in 2010-11 and 2011-12 this assessment projects short falls of some two million dollars per year. However, this is all conjecture until the State passes this year's budget. Then SGUSD will have to reevaluate matter. Table until September.

C. Pat will prepare the documentation for Darrell Clapp to file our taxes.

D. Les will contact Wayne De Pry, CPA, to do our Auditor's Report for 2008-09. We pay him a fee of \$100.00.

E. Nuccio Insurance policy for Director's Liability- Irene made the motion that Pat be given authority to investigate the possibility of negotiating a lower fee for our General Liability Insurance policy, given that our Board is much smaller. Les seconded the motion and it was passed unanimously. Pat told everyone that she sent letters to the old SEF Board members thanking them for their service to SEF and enclosing the July 1, 2009 minutes to explain how we effected that transition to a smaller Board.

F. Update our link to the SGUSD website- Some of the ideas brought forth about what we should put on the SEF weblink are:

- 1) We need to stress that we will honor the grants awarded in 2009. The only stipulation is that the items **must be ordered by October 20, 2009- NO EXCEPTIONS!**
- 2) We need to state that no teacher grants will be awarded in spring 2010.
- 3) Consider what we will raise money for in the future. Some ideas are: recorders for the 4th grade music program, IMC, GATE, Speech and Debate teams, Mock Trial teams, History Day competition instrumental and vocal music and extended GHS Library hours. We need to focus on important District programs that are in jeopardy due to budgetary cuts.
- 4) Pat is definitely retiring, now is a time of transition.

Pat will write up a statement for the website.

Les stated that, although there was no formal Treasurer's Report there were checks to be ratified. He passed out a copy of the Register Listing, 7/1/09 through 7/15/09. We need to ratify checks # 1189-1202, totaling \$630.00. These checks are all refunds for the Summer School Program. There was one deposit noted from various sources of \$3,331.00. A copy of this register is appended to the official copy of these minutes. Diana moved and Jan seconded that checks #1189-1202 be ratified. The motion was passed unanimously.

Pat wished everyone a happy "rest of the summer". Our next meeting is Thursday, September 17, 2009 at the Freeman's home.

The meeting was adjourned at 8:15 p.m.

Respectfully submitted,


Recording Secretary

**SAN GABRIEL EDUCATION FOUNDATION
YEAR END REPORT JUNE 30, 2009**

CHECKING ACCOUNT BALANCE	\$ 6,419.35
CD ACCOUNT BALANCE	\$ 41,425.62
MONEY MARKET ACCOUNT BALANCE	\$ 76,073.22
TOTAL CASH ASSETS	<u>\$ 123,918.19</u>
RECEIPTS	
MEMORIAL DONATION	\$ 50.00
FUND RAISER - FAN AUCTION	\$ 1,854.25
FUND RAISER - SILENT AUCTION	\$ 3,990.00
FUND RAISER - LIVE AUCTION	\$ 870.00
FUND RAISER - ADVERTISING	\$ 1,310.00
FUND RAISER - DONATIONS	\$ 1,590.79
FUND RAISER - PREMIUM TDABLES	\$ 5,250.00
FUND RAISER - TICKET SALES	\$ 6,760.00
TOTAL FROM FUND RAISER	\$ 21,625.04
INTEREST FROM CD	\$ 688.78
INTEREST FROM CHECKING ACCOUNT	\$ 5.74
INTEREST FROM MONEY MARKET ACCT	\$ 85.32
TOTAL INTEREST	\$ 779.84
MEMORIAL DONATION	\$ 50.00
CAPITAL CAMPAIGN	\$ 16,254.38
MISSION CAR WASH	\$ 2,043.32
SUMMER SCHOOL ENRICHMENT PROGRAM	\$ 51,980.00
TOTAL RECEIPTS	<u>\$ 92,782.58</u>
EXPENSES	
GRANTS PAID	\$ 39,389.69
2009 FUND RAISER	\$ 4,906.50
INSURANCE	\$ 343.00
OFFICE SUPPLIES	\$ 33.87
POSTAGE AND BOX RENTAL	\$ 480.86
PRINTING	\$ 638.68
MISCELLANEOUS	\$ 619.45
SUMMER SCHOOL ENRICHMENT EXPENSES	\$ 32,639.71
TOTAL EXPENSES	<u>\$ 79,051.76</u>
LIABILITIES	
ENRICHMENT EXPENSES FOR 2009 ARE UNKNOWN AT THIS TIME.	
NOTES	
THE SUMMER SCHOOL ENRICHMENT RECEIPT AMOUNT INCLUDES MONIES FOR TWO PROGRAMS; 2008 (NET) AND 2009 (GROSS) WHICH DOES NOT ALLOW FOR THE UNKNOWN 2009 EXPENSES).	
THE MONEY MARKET FUND INCLUDES ALL 2009 ENRICHMENT RECEIPTS INTEREST ON THE CD WAS COMPUTED IN 10/08 AND 04/09 AND IS INCLUDED IN THE VALUE SHOWN FOR THE CD.	
THIS REPORT IS PRELIMINARY UNTIL THE STATEMENTS FROM UNION BANK ARE RECEIVED, RECONCILED, AND AUDITED.	



SEF Board of Directors Meeting, Thursday, November 19, 2009
Freeman Home, 537 Gerona Ave., San Gabriel at 7 pm

NAME (Printed Please)	Hours
1. Pat Freeman	20 hrs
2. Katherine Kleine	
3. Diane Jiza	
4. Irene Chapman	10 hours
5. Les Felon	10 hours
6. LEE FREEMAN	
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Address Notarize
- Postmaster + Bulk Mail -



San Gabriel Educational Foundation

BOARD OF DIRECTORS MEETING AGENDA
Thursday, November 19, 2009, 7 PM, Freeman Home

WELCOME !

MINUTES BY RECORDING SECRETARY: Irene Chapman, Recording Secretary

TREASURER'S REPORT. Les Fedor (Bills to Ratify)

Auditor at work on books?

CORRESPONDING SECRETARY: Diana Fagan (memos, paper & postage by Fagan)

CURRENT BUSINESS

- A. 2009 -10 Brochure to go to 23,000 households in San Gabriel this week.
SEF focus to help make up State budget short falls for District programs with more donor designation opportunities - Endowments & Grant Seeking
 - 1. Chris Kleine of LithoLink : Need Invoice - action_____
 - 2. Prepare bags & deliver new SEF Brochures into Teacher Boxes:
GHS DMS JMS Coolidge McKinley Roosevelt Washington Wilson DEC

- B. Executive Director (ED) Search based on San Marino Schools Foundation model with ED as employee of the District insures continuity of SEF for future and allows Summer School Enrichment Program to continue etc. - Pat's report
 - 1. Part time employee with salary of \$25,000 per year. Invoiced by District to SEF
 - 2. Salary to include partial benefits, workers compensation etc. to be worked out with Interim HR Director Janet Reese at meeting.
 - 3. Hiring of ED as SGUSD employee requires Board of Education approval to continue
 - 4. ED Job Description revised: Irene Chapman, Jan Stowell & Pat Freeman

- C. SEF Teacher Grants for 2008-2009 Report - Les Fedor & Pat Freeman

NEW BUSINESS

- A. Darrell Clapp prepared SEF's IRS Reports and State Reports -Sent & Received

- B. Other

Les who/where
Staff Toy



6

ADJOURNMENT

NEXT SEF BOARD OF DIRECTORS MEETING?

January 21st

**SAN GABRIEL EDUCATIONAL FOUNDATION
BOARD OF DIRECTORS MEETING MINUTES
THURSDAY, OCTOBER 8, 2009**

The meeting was called to order by President Pat Freeman at 7:10 p.m.

Present: Jan Stowell, Les Fedor, Diana Fagan, Lee Freeman, Pat Freeman, Katherine Kleine and Irene Chapman.

Pat announced that Nuccio Insurance, our carrier, has lowered our General Liability and Event Insurance policy fee to \$412.00 for this year. This is great news.

MINUTES- The minutes of the July 16, 2009 meeting were unanimously approved as self-read.

TREASURER'S REPORT- Les reported that in the fiscal period July 1, 2009 through September 30, 2009, total receipts were \$5,015.54, total disbursements were \$52,309.71. Checking account balance is \$10,253.22, Money Market balance is \$24,944.18 and CD balance is \$41,4225.62, giving a total balance of \$76,623.02. Irene made the motion and Diana seconded that the report be accepted. Motion passed unanimously. Les listed checks #1189-1209 to be ratified. It turns out that, according to the July 16, 2009 minutes, checks # 1189-1202 had already been ratified. Therefore, Les asked for ratification of checks #1203-1209, totaling \$52,337.71. These cover the Nuccio Insurance bill, Summer School Enrichment expenses, the final 2008 Teacher Grant and some 2009 Teacher Grants. Lee moved and Irene seconded that the checks be ratified. The motion was passed unanimously. The Treasurer's report will be filed for audit.

OLD BUSINESS-

The Summer School Enrichment Program and Budget Review was presented by Pat. The report is appended to these minutes. Jan asked why there were refunds. Pat answered that there were various reasons, such as overpayments, etc. Pat noted that the July 16th minutes state that all grant items must be ordered by October 20, 2009. Jan noted that Pat Sandoval at McKinley told the Staff there to get their grant Purchase Orders in quickly, as Susan ~~Smith~~ is going on vacation soon. All other campuses will be told the same information, we think. Pat will check with Susan to see how many Purchase Orders she has already received. Katherine will contact those who have not as yet sent in their Purchase Orders. Lee suggested that Pat tell Susan not to honor Purchase Orders submitted after October 20, 2009. She will do so.

NEW BUSINESS-

A. Pat showed us a mock-up of the new quad-fold SEF brochure. We want to send the brochure to 23,000 households in San Gabriel in mid-November. The inside will have four pictures, one on each fold, i.e. Hispanic, Vietnamese, Chinese and "Anglo" children with accompanying text in each language. Pat told us that The Processors Printers gave us an estimate of \$12,000.00, including postage, for the job. Chris Kleine of Litholink gave us an estimate of \$9,500.00, including postage. Pat has checked with Adriana Fontes, SG Post Office Bulk Mail Supervisor. She stated that if Superintendent Parks generated a letter giving SEF permission, we could use the .12½ cent per piece SGUSD rate to send to "Postal Customer". There are 13,988 recipients in the 91776 and 8,624 recipients in the 91775 ZIP codes, which will cost SEF \$2,713.44 in postage. Pat has already asked Dr. Parks to send a letter granting SEF permission to use the SGUSD bulk-rate postage for our brochure. Jan moved that we go forward with the brochure and use Chris Kleine's Litholink as printer. Katherine seconded and the motion was passed unanimously. We will need to write a blurb for the brochure that can be translated into the three other languages. Pat gave us a copy of SEF's 2009-10 Strategic Plan which she wrote, as a springboard for any ideas. Katherine thinks we should emphasize the State budget cuts- make our plea catchy and compelling. Pat asked us to send her our ideas for the brochure.

B. Pat showed everyone our SEF Executive Director (ED) Job Description. Pat and Irene used the San Marino Schools Foundation ED Job Description as a template for ours.

1. The ED would be an employee of the SGUSD, with compensation provided by SEF.
2. The total compensation package will be \$25,000.00 per year, which covers half-time salary and half-time benefits. The details will be worked out with interim Human Resources Director Janet Reece.

3. If both SEF and the SGUSD Administration agree on the details re: the hiring of the part-time ED, then Dr. Parks will write a formal letter to the Board of Education asking for their approval to start the search for the new ED. Les made the motion that we go forward with the search for the new part-time ED for SEF and ask Dr. Parks to write a letter presenting the request to the Board of Education. Diana seconded the motion and it was passed unanimously.

C. Pat presented a request by the new GHS Vice-Principal, Ruth Esseln, asking for \$4,500.00 for partial funding for teacher substitutes during a 3-Day English Writing Skills Assessment meeting. After discussion, it was decided that this was not anything we had done in the past; nor did we wish to set any new precedents. Les made the motion that we would decline at this particular time. Katherine seconded the motion and it was passed unanimously.

D. Other Items-

It was suggested by Jan and echoed by Diana that in the ED Job Description page 3 item 3 the words "Up to date" be inserted before the phrase, "computer literacy required." Pat again reminded us that funding for the ED position is covered by our Summer School Enrichment Program revenue.

Pat also said that Winkel/McPhee has indicated they may know a good candidate for the ED position. We will inform them when the interviews are to be scheduled.

At Lee's suggestion, Pat will aim to have everything prepared to present to the Board at their October 27th meeting. She will call Janet Reece tomorrow to schedule an appointment for next week.

*W. J. Lee, 2009
J 2:30 pm*

ADJOURNMENT-

The meeting was adjourned at 8:35 p.m.

The next SEF Board meeting will be Thursday, November 19, 2009, 7 p.m. at the Freeman's home.

Respectfully submitted,

Shene B. Chapman
Recording Secretary



SEF Board of Directors Meeting, Thursday, January 21, 2010
Freeman Home, 537 Gerona Ave., San Gabriel at 7 pm

NAME (Printed Please)	Hours
1. Pat Freeman	10 hrs
2. Les Fedon	8 hrs
3. Irene Chapman	6 hrs.
4. Jan Stowell	1 hr.
5. LEE FREEMAN	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	



San Gabriel Educational Foundation



BOARD OF DIRECTORS MEETING AGENDA
Thursday, January 21, 2010, 7 PM, Freeman Home

WELCOME !

MINUTES BY RECORDING SECRETARY: Irene Chapman, Recording Secretary

TREASURER'S REPORT: Les Fedor (Bills to Ratify)

Auditor at work on books?

CORRESPONDING SECRETARY: Diana Fagan (memos, paper & postage by Fagan)

CURRENT BUSINESS

A. 2009 -10 Brochure mailed to 23,000 households in San Gabriel week of Nov. 19.
SEF focus to help make up State budget short falls for District programs
with more donor designation opportunities - Endowments & Grant Seeking

1. Chris Kleine of LithoLink :	Paid	\$6,021.76
2. Postal Fee	Paid	<u>\$1,515.01</u>
3. Total cost		\$7,635.77

B. Approximately 110 donations so far with variety of donor designations.

C. SEF Teacher Grants for 2008-2009 Report - Les Fedor & Pat Freeman

NEW BUSINESS

A. Put together mailing for consistently giving donors from past years - Pat

B. Meeting with Dr. Parks, Irene Chapman, Lee & Pat Freeman on
Wednesday, January 27, 2010 requesting approval from the Board of Education
for the SEF Executive Director to be an employee of SGUSD paid by SEF.
The SEF Executive Director position to be floated on the District Job Board
ASAP.

C. Meeting with Khai Nguyen to update SEF's Website link to the SGUSD Web site.
Recommendation to put whole new SEF Brochure on the link?

D. Send in S100 for Information to State of California with \$25.00 fee

ADJOURNMENT

NEXT SEF BOARD OF DIRECTORS MEETING?



Happy Valentine's Day!

SAN GABRIEL EDUCATIONAL FOUNDATION
Board of Directors meeting Minutes
Thursday, November 19, 2009

The meeting was called to order by President Pat Freeman at 7:21 p.m. Pat announced that Jan Stowell had a conflict and could not attend. Pat will provide Jan with all relevant information.

PRESENT: Pat Freeman, Katherine Kleine, Diana Fagan, Les Fedor, Lee Freeman and Irene Chapman.

ABSENT: Jan Stowell

MINUTES- There were two corrections as follows: 1) under OLD BUSINESS, the spelling of the last name for Susan is "Celaya"; 2) under NEW BUSINESS, item A, the sentence beginning "Jan moved..." there is a double letter "t". The Minutes were approved unanimously as corrected.

TREASURER'S REPORT- Les presented his report, which was current through November 17, 2009. (A copy is appended to the Official Minutes. This is a running total from July 1, 2009 to November 17, 2009. In answer to a question, Les answered that the income reported under the Capitol Campaign comes from Dr. Susan Parks, who has generously donated \$100.00/month since she began her tenure, and Kevin and Michelle McClure and Linda Steele, who have opted out of the teacher's union, and donate that sum to SEF every month. Les announced that most of the 2009 Teacher Grant purchase orders have been placed already. The only ones that have not are for History Day and Mock Trial grants that need to be processed in Spring. The amount noted in the Treasurer's Report as 2009 GRANTS includes all the designated funds, i.e. Gate, IMC, etc. and the 2009 Teacher Grants already paid. The RECEIPTS total \$5,733.25, the DISBURSEMENTS total \$28,920.34, plus Summer School expenses of \$31,197.45, for a total of \$60,117.79. The balance in the Checking Account is \$3,231.26; balance in the Money Market Account is \$24,949.28; the balance in our CD is \$41,425.62, giving a total balance of \$69,606.16 in the bank.

Katherine asked, how much did SEF make, net, from the 2009 Summer School Program? Les answered, just over \$23,000.00. Pat stated that it will cost more next year (2010), because SEF will be responsible for Administrative Fees, since SGUSD will have no money for these expenses. Katherine moved and Lee seconded that the Treasurer's Report be accepted. Motion was passed unanimously. The Report will be filed for audit. Next, Les presented the list of checks to be ratified. They are checks #1210-1219, totaling \$7,808.08. They are listed out on the back of the appended Treasurer's Report. Diana moved and Les seconded, that the checks be ratified. Motion passed unanimously.

CORRESPONDING SECRETARY- No items have been received. Pat thanked Diana for the timely meeting memos and her generous donation of the postage.

CURRENT BUSINESS-

A. Pat asked if everyone had received the new SEF brochure. Most already had received them. Consensus was that they look great!!! The designation "Postal Customer" cost 0.0675 cents per brochure. The postage price is to be reimbursed to SGUSD. Many thanks to Dr. Parks for allowing us to use the SGUSD postal permit. Another cost savings to SEF was that the gummed tabs were not needed.

1. Pat mentioned that we needed the invoice from Chris Kleine so that we may pay him promptly. Pat asked Katherine to remind Chris to send us the invoice for payment.
2. Pat had bags prepared with the school names on them. She asked the Directors to stay for a few minutes after the meeting to fill the bags with SEF brochures for the staffs of each site and the DEC staff as well. We will use about 600 brochures for this outreach.

B. Executive Director (ED) Search-

1. With regard to the search for the ED, Pat stated our goal is to have the ED a part time District employee at a salary of \$25,000.00. This will insure both the continued viability of SEF and the continuation of the Summer School Program.
2. The \$25,000.00 is for a part time position with part time benefits, details to be worked out with interim HR Director Janet Reece.
3. We will need the approval of the Board of Education for this to happen. Pat does not expect to have a decision from them until sometime in January. Lee said that he could see no great obstacle

to a favorable decision.

4. The ED Job Description was revised by Pat Freeman, Jan Stowell and Irene Chapman.

C. SEF Grants for 2008-09- These grants will be paid as the Purchase Orders are received by Pat and Les. We have slightly more money available since the SEF brochure cost less than expected since we did not need to use the gummed tabs.

NEW BUSINESS-

A. The IRS and Franchise Tax Board reports have been completed by Darrell Clapp. Pat has sent them out and has received the return notification of receipt from both entities.

B. We will not meet in December. Our next meeting will be Thursday, January 21, 2010, 7 p.m. at the Freeman home.

Pat wished everyone a Happy Holiday Season.

The meeting was adjourned at 8:00 p.m.

Respectfully submitted,


Irene B. Chapman

Recording Secretary

SAN GABRIEL EDUCATIONAL FOUNDATION		
FISCAL PERIOD JULY 1, 2009 THROUGH JANUARY 19, 2010		
RECEIPTS		
	CAPITAL CAMPAIGN	\$ 8,068.28
	MISSION CAR WASH	\$ 1,367.64
	INTEREST 2 ACCOUNTS	\$ 83.09
	SUB TOTAL	\$ 9,519.01
	SUMMER SCH. ENRICHMENT	\$ 2,943.00
	TOTAL RECEIPTS	\$ 12,462.01
DISBURSEMENTS		
	2008 GRANT	\$ 2,432.44
	2009 GRANTS	\$ 41,815.25
	INSURANCE	\$ 387.00
	POSTAGE & BOX RENTAL	\$ 1,662.82
	PRINTING (BROCHURE)	\$ 6,120.76
	MISCELLANEOUS	\$ 308.62
	SUBTOTAL	\$ 52,726.89
	SS ENRICHMENT - EXPENSES	\$ 31,197.45
	TOTAL DISBURSEMENTS	\$ 83,924.34
BANK ACCOUNTS		
	CHECKING	\$ 6,072.95
	MONEY MARKET	\$ 4,956.29
	CERT. OF DEPOSIT	\$ 41,425.62
	TOTAL BANK ACCOUNTS	\$ 52,454.86



SEF Board of Directors Meeting, Wednesday, February 24, 2010
Freeman Home, 537 Gerona Ave., San Gabriel at 7 pm

NAME (Printed Please)

Hours

1. Pat Freeman 15 hrs
2. Les Fedor 7 hrs
3. Jan Stowell 2 hrs
4. Trene Chapman 4 hrs
5. Dink H
6. Katherine Klein
7. LEE FREEMAN
8. _____
9. _____
10. _____
11. _____
12. _____
13. _____
14. _____
15. _____



San Gabriel Educational Foundation



BOARD OF DIRECTORS MEETING AGENDA

Wednesday February 24, 2010, 7 PM, Freeman Home

WELCOME New Board of Education to SEF Liaisons Scott Svonkin and Philip Hu

MINUTES BY RECORDING SECRETARY: Irene Chapman, Recording Secretary

TREASURER'S REPORT. Les Fedor (Bills to Ratify)
Auditor at work on books: When will the audit be complete?

CORRESPONDING SECRETARY: Diana Fagan (memos, paper & postage by Fagan)

CURRENT BUSINESS

- A. CAPITAL CAMPAIGN UPDATE - Pat
- B. Report on meeting with Dr. Parks on Wednesday, Jan. 27 - Lee & Irene
- C. Update on SEF web link to SGUSD - Pat
- D. Other

NEW BUSINESS

- A. SEF'S SUMMER SCHOOL ENRICHMENT PROGRAM (SSSEP) MOU WITH SGUSD
 - 1. SGUSD Schools offering for Tuition Summer School
 - a. McKinley Elementary K-6
 - b. Jefferson Middle School 7-8
 - c. Gabrielino High School 9-12

2. Course offerings, teachers and SEF Responsibilities

B. Review the SEF By-Laws - *Table*

C. NEXT SEF BOARD OF DIRECTORS MEETING?
Wednesday, March 24 or Thursday, March 25 at 7 PM at Freemans

D. Other

Should SEF continue partial funding of the IMC Lab with Barbara Gorton as manager with a stipend of \$5,600 for the year 2010-11?



HAPPY ST. PATRICK'S DAY!

ADJOURNMENT

SAN GABRIEL EDUCATIONAL FOUNDATION
BOARD OF DIRECTOR'S MEETING MINUTES
THURSDAY, JANUARY 21, 2010 }

The meeting was called to order by President Pat Freeman at 7:20 pm. She welcomed everyone.

Present: Pat Freeman, Jan Stowell, Les Fedor, Lee Freeman and Irene Chapman.

Excused Absences: Diana Fagan and Katherine Kleine

Minutes: The minutes of the November 19, 2009 meeting were self-read. Minutes were unanimously approved as self-read.

Treasurer's Report: Les stated that this report was cumulative and covers activity through January 19th, 2010. Total receipts are \$12,462.01; Total Disbursements are (includes Summer School) \$83,924.34. Checking Account balance is \$6,072.95, Money Market account balance is \$4,956.29 and CD balance is \$41,425.62, for a total of \$52,454.86. Les reported that the CD matures in April and should yield about \$1,000.00 in interest. Pat will give Les an envelope with the latest donations received after the meeting. In answer to a question, Les stated that the Auditor is still working on the books. Jan moved and Irene seconded the motion that the Treasurer's Report be approved. Motion passed unanimously. Report will be filed for audit.

Corresponding Secretary: Thanks to Diane for the meeting memos and donation of the postage.

CURRENT BUSINESS-

A. SEF's 2009-10 brochure was mailed to 23,000 households during the week of November 19th, 2009. The total cost to SEF was \$7,635.77. \$6,021.76 went to Chris Kleine of LithoLink and the Bulk Mail fee was \$1,515.01. These expenses have been paid.

B. There have been approximately 110 donations received for a variety of designations, totalling \$8,068.28. The designations were: Teacher Grants, Art, Mock Trial-GHS, Mock Trial-JMS, GHS Speech and Debate, GHS AVID program, JMS AVID program, Music, Drama, JMS ASB, GHS Band, GATE, GHS Sports and by far, the most popular with a little over \$5,000.00 in donations, AS NEEDED. It looks as though people want to support programs that need it, not teacher grants.

C. Les and Pat said that it is difficult to tell if the expenses of the 2008-09 grants are totally paid.

NEW BUSINESS-

A. In light of the low return rate from our mailing, Pat will send another mailing, targeting 115 past consistent donors in early March.

B. Pat and Lee and Irene will meet with Dr. Parks on Wednesday, January 27th, to discuss the timing for requesting approval from the Board of Education to make the SEF Executive Director a part-time employee of the SGUSD, with annualized compensation to be provided by SEF. We will request that the position be "floated" on the SGUSD Job Board as soon as possible.

C. Pat will be meeting with Khai Nguyen to update SEF's link to the SGUSD website. The SEF Board members agreed that we should add the new Brochure to our site. It was further decided that 1) we should list the names of the Board Transition Team; 2) explain our need to search for a part-time Executive Director for SEF; 3) add a "thank you" to those who donated and a request for further funds. The "thank you" will be worded as follows:

We are pleased with the initial response to the new SEF brochure, but we are anticipating a greater response in the near future. 95% of your contributions are returned to fund student programs. Thank you for your support."

D. Pat said that she will submit Form S-100, State of California Statement of Information for Non-Profits, along with the \$20.00 fee owed.

ADJOURNMENT-

The meeting was adjourned at 7:54 pm. Our next meeting will be Wednesday, February 24, 2010, 7pm at the Freeman's home.

Respectfully Submitted,

Irene A. Chapman
Recording Secretary

SAN GABRIEL EDUCATIONAL FOUNDATION**FISCAL PERIOD JULY 1, 2009 THROUGH FEBRUARY 23, 2010****RECEIPTS**

CAPITAL CAMPAIGN	\$	8,924.18
MISSION CAR WASH	\$	1,538.54
CKG ACCOUNT INTEREST	\$	2.90

SUB TOTAL	\$	10,465.62
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SUMMER SCH. ENRICHMENT	\$	2,943.00
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TOTAL RECEIPTS	\$	13,408.62
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DISBURSEMENTS

2008 GRANT	\$	2,432.44
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2009 GRANTS	\$	47,198.74
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INSURANCE	\$	387.00
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BANK CHARGE	\$	2.00
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MISCELLANEOUS	\$	303.62
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POSTAGE & BOX RENTAL	\$	1,662.82
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PRINTING	\$	6,120.76
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SUBTOTAL	\$	58,107.38
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SS ENRICHMENT - EXPENSES	\$	31,830.45
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TOTAL DISBURSEMENTS	\$	89,937.83
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BANK ACCOUNTS

CHECKING	\$	1,719.59
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MONEY MARKET	\$	4,956.29
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CERT. OF DEPOSIT	\$	41,425.62
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TOTAL BANK ACCOUNTS	\$	48,101.50
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SAN GABRIEL EDUCATIONAL FOUNDATION
 CHECKS FOR PAYMENT APPROVAL THROUGH FEBRUARY 23, 2010

CHECK #	AMOUNT	PAYEE	REASON
1189	\$ -	VOID	
1190	\$ 90.00	NHON	REFUND SS ENRICHMENT
1191	\$ 90.00	SAM	REFUND SS ENRICHMENT
1192	\$ 10.00	LIU	REFUND SS ENRICHMENT
1193	\$ 25.00	PHAUM	REFUND SS ENRICHMENT
1194	\$ 10.00	GONZALEZ	REFUND SS ENRICHMENT
1195	\$ 15.00	PAU	REFUND SS ENRICHMENT
1196	\$ 10.00	KWAK	REFUND SS ENRICHMENT
1197	\$ 15.00	MATCIZENKO	REFUND SS ENRICHMENT
1198	\$ 15.00	PAU	REFUND SS ENRICHMENT
1199	\$ 15.00	VILLERA	REFUND SS ENRICHMENT
1200	\$ 15.00	ZHANG	REFUND SS ENRICHMENT
1201	\$ 85.00	JEONG	REFUND SS ENRICHMENT
1202	\$ 235.00	CORREA	REFUND SS ENRICHMENT
1203	\$ 3.00	HERNANDEZ	REFUND SS ENRICHMENT
1204	\$ 2,432.44	SGUSD	2008 GRANT
1205	\$ 412.00	NUCCIO	INSURANCE
1206	\$ 6,292.82	SGUSD	2009 GRANTS
1207	\$ 28,433.72	SGUSD	SS ENRICHMENT EXPENSES
1208	\$ 2,763.73	SGUSD	SS ENRICHMENT EXPENSES
1209	\$ 12,000.00	SGUSD	IMC;GATE;4THMUSIC PROGRAM
1210	\$ 450.00	CONST. RTS	2009 GRANTS
1211	\$ 450.00	CONST. RTS	2009 GRANTS
1212	\$ 450.00	CONST. RTS	2009 GRANTS
1213	\$ 450.00	CONST. RTS	2009 GRANTS
1214	\$ 138.62	G. CARNEY	BOOT CAMP
1215	\$ 120.00	SG C OF C	DUES
1216	\$ 25.00	REGISTRY	MISC
1217	\$ 40.00	POSTMASTER	RENTAL
1218	\$ 518.41	N. AGUIRRE	2009 GRANTS
1219	\$ 5,166.05	SGUSD	2009 GRANTS
1220	\$ 19.81	LEE FREEMAN	POSTAGE
1221	\$ 6,120.76	LITHOLINK	BROCHURES
1222	\$ 9,528.07	SGUSD	2009 GRANTS
1223	\$ 88.00	POSTMASTER	POSTAGE
1224	\$ 814.88	SGUSD	2009 GRANTS
1225	\$ 1,515.01	SGUSD	2009 GRANTS
1226	\$ 5,695.02	SGUSD	2009 GRANTS
1227	\$ -	VOID	
1228	\$ 20.00	CA.SECY STATE	FILING FEE
1229	\$ 5,383.49	SGUSD	2009 GRANTS
EFT	\$ 2.00	UNION BANK	BANK CHARGE
	\$ 89,962.83		

SAN GABRIEL EDUCATIONAL FOUNDATION

FISCAL PERIOD JULY 1, 2009 THROUGH FEBRUARY 23, 2010

RECEIPTS

CAPITAL CAMPAIGN	\$	8,924.18
MISSION CAR WASH	\$	1,538.54
CKG ACCOUNT INTEREST	\$	2.90
SUB TOTAL		\$ 10,465.62
SUMMER SCH. ENRICHMENT	\$	2,943.00
TOTAL RECEIPTS	\$	13,408.62

DISBURSEMENTS

2008 GRANT	\$	2,432.44
2009 GRANTS	\$	47,198.74
INSURANCE	\$	387.00
BANK CHARGE	\$	2.00
MISCELLANEOUS	\$	303.62
POSTAGE & BOX RENTAL	\$	1,662.82
PRINTING	\$	6,120.76
SUBTOTAL		\$ 58,107.38
SS ENRICHMENT - EXPENSES	\$	31,830.45
TOTAL DISBURSEMENTS	\$	89,937.83

BANK ACCOUNTS

CHECKING	\$	1,719.59
MONEY MARKET	\$	4,956.29
CERT. OF DEPOSIT	\$	41,425.62
TOTAL BANK ACCOUNTS	\$	48,101.50

SAN GABRIEL EDUCATIONAL FOUNDATION
 CHECKS FOR PAYMENT APPROVAL THROUGH FEBRUARY 23, 2010

CHECK #	AMOUNT	PAYEE	REASON
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1194	\$ 10.00	GONZALEZ	REFUND SS ENRICHMENT
1195	\$ 15.00	PAU	REFUND SS ENRICHMENT
1196	\$ 10.00	KWAK	REFUND SS ENRICHMENT
1197	\$ 15.00	MATCIZENKO	REFUND SS ENRICHMENT
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1201	\$ 85.00	JEONG	REFUND SS ENRICHMENT
1202	\$ 235.00	CORREA	REFUND SS ENRICHMENT
1203	\$ 3.00	HERNANDEZ	REFUND SS ENRICHMENT
1204	\$ 2,432.44	SGUSD	2008 GRANT
1205	\$ 412.00	NUCCIO	INSURANCE
1206	\$ 6,292.82	SGUSD	2009 GRANTS
1207	\$ 28,433.72	SGUSD	SS ENRICHMENT EXPENSES
1208	\$ 2,763.73	SGUSD	SS ENRICHMENT EXPENSES
1209	\$ 12,000.00	SGUSD	IMC;GATE;4THMUSIC PROGRAM
1210	\$ 450.00	CONST. RTS	2009 GRANTS
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1220	\$ 19.81	LEE FREEMAN	POSTAGE
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1226	\$ 5,695.02	SGUSD	2009 GRANTS
1227	\$ -	VOID	
1228	\$ 20.00	CA.SECY STATE	FILING FEE
1229	\$ 5,383.49	SGUSD	2009 GRANTS
EFT	\$ 2.00	UNION BANK	BANK CHARGE

\$ 89,962.83



San Gabriel Educational Foundation



BOARD OF DIRECTORS MEETING AGENDA
Thursday, March 25, 2010, 7 PM,
Freeman Home

WELCOME: Board of Education SEF Liaisons Philip Hu and Scott Svonkin

MINUTES BY RECORDING SECRETARY: Irene Chapman, Recording Secretary

TREASURER'S REPORT: Les Fedor (Bills to Ratify)
Auditor at work on books: When will the audit be complete?

CORRESPONDING SECRETARY: Diana Fagan

OLD BUSINESS

- A. CAPITAL CAMPAIGN UPDATE - Pat Freeman ✓
- B. Past SEF Board Member Linda Steele's Request & SEF's Response - Pat Freeman ✓
- C. OTHER

NEW BUSINESS

- A. Presentation of the Updated SEF Executive Director Job Description by SEF President's appointed committee members Irene Chapman and Lee Freeman
(Passed)
6-0 1 absent
- B. Review the SEF By-Laws - Tabled to next meeting
- C. NEXT SEF BOARD OF DIRECTORS MEETING
Thursday, April 22, 2010
- D. OTHER

HAPPY



ADJOURNMENT

**SAN GABRIEL EDUCATIONAL FOUNDATION
BOARD OF DIRECTOR'S MEETING MINUTES
WEDNESDAY, FEBRUARY 24, 2010**

The meeting was called to order by President Pat Freeman at 7:22 p.m.

Present: Pat Freeman, Jan Stowell, Les Fedor, Katherine Kleine, Lee Freeman and Irene Chapman.

Excused absence: Diana Fagan

Also present was Phillip Hu, SGUSD Board Liaison to SEF. The other SGUSD Board Liaison, Scot Svonkin, was unable to attend.

Pat welcomed Phil as one of our new liaisons.

Minutes- The minutes of the January 21, 2010 meeting were self-read. Les said that there was one correction under the Treasurer's Report, that the Treasurer's Report should be "accepted" and not "approved". The minutes were approved as corrected.

Treasurer's Report- This report is cumulative from July 1, 2009 through February 23, 2010. Total receipts are \$13,408.62 and Total Disbursements are \$89,937.83. The Checking Account balance is \$1719.59, the Money Market balance is \$4,956.29, the CD balance is \$41,425.62, giving a total of \$48,101.50. In answer to a question, Les stated that most of the 2009 Teacher Grants have been paid out. There are still about 5 left to pay. Irene made the motion that the Treasurer's Report be accepted. Jan seconded the motion. The motion was passed unanimously. The report will be filed for audit. Les then presented the checks to be ratified. The checks, listed on the back of the Treasurer's Report, were listed cumulatively from July 1, 2009 through February 23, 2010. Lee asked what checks #1210-1213 were for. Les stated that those were to the Constitutional Rights Foundation for the Mock Trial Grants. Les asked that checks #1220-1229 be ratified. Lee moved and Katherine seconded the motion that checks # 1220-1229 be ratified. The motion was passed unanimously.

Pat explained our Teacher Grant process, purchase orders, payments, etc. to Phil Hu. She stated that SEF would not be giving out any Grants this year. Les told Pat that the audit for 2008-09 would be completed by our next meeting. Pat asked Les for a copy of the previous year's audit. Les will get it to her.

CURRENT BUSINESS-

A. Capital Campaign Update- As a result of our mass mailing of 23,000 brochures, we realized 110 donations, totaling \$8,900.00. Pat believes if she mails a direct appeal to our most consistent donors, we will obtain more donations. She also believes that the lower amount of donations is a byproduct of the economy. Pat has sent thank you letters to all donors to date. She will contact our most consistent donors after returning from Catalina.

B. Pat reported on the meeting with Dr. Parks on Wednesday, January 27th. Dr. Parks was made aware of SEF's intentions. They are: if no person, mutually acceptable to both SEF and the SGUSD, is in place as a half-time Executive Director by June 1, 2010; SEF will commence dissolution proceedings. In order for the search for an ED to commence, the BOE must give its okay to SEF's proposal requesting their approval to make the SEF ED a half-time employee of the SGUSD, with annualized compensation provided by SEF. The BOE must then agree to "fly" the position. We have already provided the Administration with a Job Description. This person could be a 50% SEF and 50% SGUSD employee. Phillip Hu suggested that recent graduates, unsuccessful in their job quests, might be interested. Both Lee and Pat mentioned that a possibility "floated" by Dr. Parks and Mrs. Crunelle was, that since a Department under Instructional Services is being reorganized, a part-time Director II could split their time between SEF and SGUSD. This would require BOE approval of the Director II position. This person would, in effect, have two persons to report to. Katherine asked Phil Hu to see if he could get this on the agenda for the March 16th BOE meeting as an action item. Phil said that he would see if this could be done.

C. Update on the SEF web link to the SGUSD website- Pat stated that we all should "take a peek" at our website. All is updated, thanks to Khai Nguyen.

D. Other- None

NEW BUSINESS-

A. SEF's Summer School Enrichment Program (SSSEP) MOU with the SGUSD- A packet containing a copy of the Memorandum of Understanding includes an addendum re: Gabrielino High School. This MOU was signed today by Pat Freeman for SEF and Dr. Susan Parks for SGUSD. The sites for the 2010 Summer School are: grades K-6 at McKinley; grades 7-8 at Jefferson Middle School and grades 9-12 at Gabrielino High School. In answer to a question, Pat stated that we do not have a list of classes for Gabrielino as yet. However, all classes taken on a tuition basis at Gabrielino will be "get ahead" classes.

B. Review of SEF Bylaws- Pat distributed packets including both our Bylaws and Articles of Incorporation. She asked the Board of Directors to study them and be prepared to discuss them at our next meeting.

C. Date for Our Next SEF Meeting- Pat offered the choice of either Wednesday, March 24th, or Thursday, March 25th, as possible dates. Les may have a conflict. He will notify Pat and she will let the rest of the Directors know the date chosen. The meeting time will be 7:00 p.m. at the Freeman's home.

D. Other- Pat brought up the question "Should SEF continue partial funding of the IMC Lab with Barbara Gorton as manager with a stipend of \$5,600.00 for the 2010-11 school year?" Discussion brought out these points: 1) Barbara would continue for one more year; 2) the teachers appreciate all she does and what the IMC offers; 3) She will have the position unless the District retires her; 4) Pat will check with Mark Chaldu as to how much the \$5,600.00 stipend actually covers of the total expenses to the SGUSD. Les made the motion that "SEF continue partial funding of the IMC Lab, with Barbara Gorton as manager, with a stipend of \$5,600.00 to be paid by SEF, for the school year 2010-11; as long as Barbara Gorton remains a School District employee." Jan seconded the motion. The vote was unanimous

ADJOURNMENT- The meeting was adjourned at 8:22 p m.

Respectfully submitted,


Recording Secretary

SAN GABRIEL EDUCATIONAL FOUNDATION		
FISCAL PERIOD JULY 1, 2009 THROUGH MARCH 23, 2010		
RECEIPTS		
	CAPITAL CAMPAIGN	\$ 8,753.28
	MISSION CAR WASH	\$ 1,700.16
	CKG ACCOUNT INTEREST	\$ 3.14
	MONEY MARKET INTEREST	\$ 82.06
	SUB TOTAL	\$ 10,538.64
	SUMMER SCH. ENRICHMENT	\$ 3,576.00
	TOTAL RECEIPTS	\$ 14,114.64
DISBURSEMENTS		
	2008 GRANT	\$ 2,432.44
	2009 GRANTS	\$ 47,198.74
	INSURANCE	\$ 387.00
	BANK CHARGE	\$ 4.00
	MISCELLANEOUS	\$ 303.62
	POSTAGE & BOX RENTAL	\$ 1,662.82
	PRINTING <i>Brochure</i>	\$ 6,120.76
	SUBTOTAL	\$ 58,109.38
	SS ENRICHMENT - EXPENSES	\$ 31,830.45
	TOTAL DISBURSEMENTS	\$ 89,939.83
BANK ACCOUNTS		
	CHECKING	\$ 1,708.55
	MONEY MARKET	\$ 4,957.83
	CERT. OF DEPOSIT	\$ 41,425.62
	TOTAL BANK ACCOUNTS	\$ 48,092.00



Helping Build Our Educational Future

March 19, 2010

Mrs. Linda Steele
1131 E. Tujunga Ave.
Burbank, CA 91501

Dear Linda,

Thank you for your very generous continuing February 25, 2010 donation of \$90.30 for SEF's 2009-10 Capital Campaign for Academic Excellence. Your designation for all programs has been noted. As SEF is a 501-C3 organization, your gift is fully tax deductible to the full extent of the law. We have appreciated your rare and wonderful gift each month for the past ten years.

You informed me on March 7 that you had received a preliminary layoff notice and that you had requested assistance from the San Gabriel Teachers Association (SGTA). You were informed that you were not eligible for assistance from SGTA as you had previously contributed to SEF for the past 10 years in lieu of sending your dues to the California Teachers Association (C.T.A.). However, after some discussion with a representative from SGTA you were given the option to pay your back dues owed for this year, the sum of \$541.80, in order to be eligible for counseling concerning your possible job loss. You called me and asked that your SEF contribution to be sent in the form of a check payable to C.T.A.. Naturally, I wanted you to receive as much assistance as possible. I followed your directions and requested that the SEF Treasurer Les Fedor cut a check payable to C.T.A. for Linda Steele's dues. (a copy is attached to this letter). The check was delivered to Joanne Alston in SGUSD Payroll and Accounting on March 8, 2010. Joanne Alston assured me in a phone call that she would include the SEF check for \$541.80 along with other checks she was sending to C. T. A. on the following day, March 9, 2010.

Thank you for so many years of great support for SGUSD students. I hope that you will be reinstated to your former job at Gabrielino High School. It will be a big loss for our students if you are not. I know the members of the SEF Board send you best wishes and hope for success in your appeal.

Blessings,

A handwritten signature in black ink, appearing to read 'Pat Freeman', written over a circular scribble.

Pat Freeman, SEF President
537 N. Gerona Ave.
San Gabriel, CA 91775
(626) 287-6730
sefpataol.com



SEF Board of Directors Meeting, Thursday, April 22, 2010
Freeman Home, 537 Gerona Ave., San Gabriel at 7 pm

<u>NAME (Printed Please)</u>	<u>Hours</u>
1. Pat Freeman	20 hrs.
2. Jan Stowell	2 hrs.
3. Irene Chapman	18 hrs.
4. Les Fedor	8 hrs.
5. LEE FREEMAN	8 hrs.
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San Gabriel Educational Foundation



BOARD OF DIRECTORS MEETING AGENDA

Thursday, April 22, 2010, 7 PM,

Freeman Home

WELCOME: Pat Freeman

MINUTES BY RECORDING SECRETARY: Irene Chapman, Recording Secretary

TREASURER'S REPORT: Les Fedor (Bills to Ratify)

Auditor at work on books: When will the audit be complete?

CORRESPONDING SECRETARY: Diana Fagan

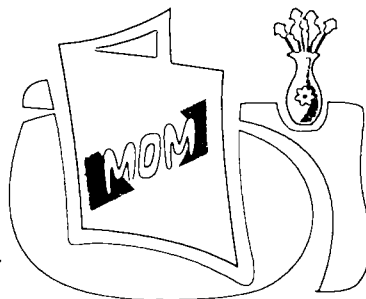
OLD BUSINESS

- A. CAPITAL CAMPAIGN UPDATE - Pat Freeman
 - 1. Responses from 101 letters sent on March 31, 2010 to previous donors
 - 2. Special SEF Donation from Brett Bashaw
- B. SEF Executive Director Position Approved at BOE Meeting 4/20/10 - Lee Freeman
- C. Barbara Gorton Position Update
- D. OTHER

NEW BUSINESS

- A. Plans for SEF's Future - Pat Freeman and SEF Board
- B. Lee & Pat Freeman's 49th Wedding Anniversary Trip May 6 - May 23
- C. NEXT SEF BOARD OF DIRECTORS MEETING **Thursday, May 27, 2010**
- D. OTHER

HAPPY



DAY!

ADJOURNMENT

**SAN GABRIEL EDUCATIONAL FOUNDATION
BOARD OF DIRECTOR'S MEETING MINUTES
THURSDAY, MARCH 25, 2010**

The meeting was called to order by President Pat Freeman at 7:22 p.m. She welcomed all to the meeting.
Present: Jan Stowell, Diana Fagan, Les Fedor, Pat Freeman, Lee Freeman, SGUSD Liaison Philip Hu and Irene Chapman. **Absent:** Katherine Kleine, SGUSD Liaison Scott Svonkin.

Pat announced that, because Philip Hu's wife is nearing her maternity due date, we will take Item A, under **NEW BUSINESS**, out of order, so that he may leave us earlier.

NEW BUSINESS-

A. Presentation of the updated SEF Executive Director (ED) Job Description- Pat appointed a subcommittee (Lee and Irene) to update the SEF Executive Director Job Description. Lee presented the separate input by both Katherine Kleine and Philip Hu to the Job Description. He then presented the final draft as drawn up by both he and Irene, which incorporates portions of everyone's input. Lee also presented a memo to the SEF Board, which includes a letter that lays out SEF's proposal of a timeline of actions that we consider necessary to achieve completion of the SEF ED's hiring by June 1, 2010. Lee and Irene propose that this letter be sent to Superintendent Susan Parks and the five members of the Board of Education by March 29, 2010, so that the actions outlined in the letter may be accomplished within the necessary timeframe. Lee asked that everyone self-read both items. Everyone complied. Lee then made the motion that, "The SEF Board approve that the attached letter be sent to the five members of the Board of Education and the Superintendent along with the final revised proposal of the SEF ED Job Description by Monday, March 29, 2010." Les seconded the motion. Some discussion points were: 1) The Bonuses are simply an incentive to grow SEF's income; 2) If a person, mutually acceptable to both SEF and the SGUSD, is in place by June 1, 2010, Pat will help this person to obtain a new SEF Board during July and August. 3) If no mutually acceptable person is in place by June 1, 2010, we will commence dissolution proceedings for SEF. The vote was 6-0, unanimous. Katherine Kleine was absent. Philip Hu left after this vote to be with his wife. Lee also left to attend the District's Oversight Committee meeting. We returned to the agenda.

MINUTES- The minutes of the Wednesday, February 24, 2010 meeting were self-read. The question was asked, are we going to fund the IMC with Barbara Gorton as manager in 2010-11? Pat said that his is not clear as yet. The minutes were approved as self-read.

TREASURER'S REPORT- Les reported that the Audit is in process now. The Treasurer's Report is cumulative from July 1, 2009 through March 23, 2010. Total receipts are \$14,114.64 and Total Disbursements are \$89,939.83. This includes Summer School Expenses. The checking account balance is \$1,708.55; the Money Market balance is \$4,957.83; and the CD balance is \$41,425.62, giving a total of \$48,092.00. Les made the motion that check # 1230 be ratified. Irene seconded the motion. This check is for \$541.80 to CTA for reinstatement of Linda Steele as a member. The letter explaining this is appended to the agenda packet. The vote was 5-0, unanimous. Katherine Kleine and Lee Freeman were absent.

OLD BUSINESS-

A. Capital Campaign Update- Pat has drafted a letter to be sent to 108 of our most faithful and consistent donors, asking for contributions. She will send them ASAP.

B. Letter to Linda Steele was covered in the Treasurer's Report. Letter itself is appended to the packet.

C. Other- None

NEW BUSINESS-

A. SEF ED Job Description, etc. already covered, see above.

B. Review SEF Bylaws- Tabled

C. Next SEF Board of Directors meeting- Pat stated that Thursday, April 22, 2010 was the tentative date proposed. Everyone can make it, except Les. He is going as a guardian to WWII Veterans on a trip to the WWII Memorial in Washington, DC. Way to go Les!!

D. Other- Question how will we obtain the Summer School checks? The checks will be collected from all sites, then given to Leslie Crunelle and then given to SEF to list and deposit. Les stated that there are 4 persons who have never cashed their refund checks from last year. Les will email Pat with their names and she will track them down and call to remind them to cash the checks and clear our books.

ADJOURNMENT- The meeting was adjourned at 8:19 p.m.

Respectfully submitted
Irene S. Chapman
Recording Secretary

SAN GABRIEL EDUCATIONAL FOUNDATION			
FISCAL PERIOD JULY 1, 2009 THROUGH APRIL 22, 2010			
RECEIPTS			
	CAPITAL CAMPAIGN	\$19,983.81	
	MISSION CAR WASH	\$ 1,920.77	
	CKG ACCOUNT INTEREST	\$ 3.14	
	MONEY MARKET INTEREST	\$ 82.57	
	SUB TOTAL	\$21,990.29	
	SUMMER SCH. ENRICHMENT	\$ 3,576.00	
	TOTAL RECEIPTS	\$25,566.29	
DISBURSEMENTS			
	2008 GRANT	\$ 2,432.44	
	2009 GRANTS	\$47,198.74	
	INSURANCE	\$ 387.00	
	BANK CHARGE	\$ 23.50	
	MISCELLANEOUS	\$ 303.62	
	POSTAGE & BOX RENTAL	\$ 1,662.82	
	PRINTING	\$ 6,120.76	
	SUBTOTAL	\$58,128.88	
	SS ENRICHMENT - EXPENSES	\$31,830.45	
	TOTAL DISBURSEMENTS	\$89,959.53	
BANK ACCOUNTS			
	CHECKING	\$13,140.31	
	MONEY MARKET	\$ 4,958.34	
	CERT. OF DEPOSIT	\$41,425.62	
	TOTAL BANK ACCOUNTS	\$59,524.27	

San Gabriel **E**ducational **F**oundation

BOARD OF DIRECTORS MEETING AGENDA
Wednesday, June 16, 2010, 7 PM,
Freeman Home

WELCOME: Pat Freeman

MINUTES of April 22, 2010: Irene Chapman, Recording Secretary
Need a volunteer to take minutes in Irene's absence

TREASURER'S REPORT: Les Fedor (Bills to Ratify)
Auditor Reports for 2007- 2008 and 2008-2009

CORRESPONDING SECRETARY: Diana Fagan

OLD BUSINESS

- A. CAPITAL CAMPAIGN UPDATE - Pat Freeman
- B. SEF/SGUSD 2010 SUMMER SCHOOL TUITION PROGRAM UPDATE - Lee Freeman

NEW BUSINESS

- A. SEF EXECUTIVE DIRECTOR RECOMMENDATION - Pat Freeman
 - 1. Seeking approval of candidate to recommend to the Board of Education?
 - 2. Invite her to the June 30 SEF Board of Directors Meeting?
- B. YEAR END SEF DESIGNATED CONTRIBUTIONS - See list attached
- C. NEXT SEF BOARD OF DIRECTORS MEETING **Wednesday, June 30, 2010**
PIZZA PARTY - ~~7 PM~~ 6:30 PM
- D. OTHER

HAPPY



ADJOURNMENT

**SAN GABRIEL EDUCATION FOUNDATION
BOARD OF DIRECTORS MEETING MINUTES
THURSDAY, APRIL 22, 2010**

The meeting was called to order by President Pat Freeman at 7:14 p.m.

Present: Jan Stowell, Les Fedor, Pat Freeman, Lee Freeman and Irene Chapman

Absent: Katherine Kleine, Diana Fagan and SGUSD Liaisons Philip Hu and Scott Svonkin. Pat announced that Phil Hu's wife, Cindy, had their new little girl, Cameron, at 2:00 a.m. this morning. Congratulations to the Hu Family!

MINUTES- The minutes of the March 25, 2010 meeting were approved as self-read.

TREASURER'S REPORT- Pat reported that we have received a \$10,000.00 donation to the Capitol Campaign. Pat will explain in detail later in the agenda. Les reported that we have been charged some new Bank charges. He will call to see if he can get them reversed. One of the charges, an image charge, we can dispense with as Les will now make copies of all the checks he writes. Pat already makes copies of all the checks that we receive. Les reported that our CD matured on April 15, 2010 and we have until April 25, 2010 to make any changes. He called Union Bank and was told that there was a CD available at the promotional rate of 2%. There would be a penalty of \$73.00 for early withdrawal, if that became necessary. The consensus was that we let the CD roll over into the existing 0.7% vehicle. The Treasurer's Report covers from July 1, 2009 through April 22, 2010. Total receipts are- \$25,566.29. Total Disbursements are- \$89,959.53. This includes 2009 Summer School expenses. The Checking Account balance is \$13,140.31; the Money Market Account balance is \$4958.34 and the CD balance is \$41,425.62, giving a total of \$59,524.27. As there were no questions, the report was filed for audit. Pat stated that there are approximately \$5000.00 in outstanding invoices from the 2009 Grants. She will check their status with Susan Celaya, of the SGUSD business office. There were no checks that required ratification.

CORRESPONDING SECRETARY- Nothing

OLD BUSINESS-

A. CAPITAL CAMPAIGN UPDATE

1. Pat reported on the response to the 101 letters she sent to previous consistent donors on March 31, 2010. She has received 15 responses totaling \$900.00.
2. SEF has received a generous donation of \$10,000.00 from a SGUSD vendor, Brett Bashaw, who is a construction contractor. He and his wife support educational entities such as ours in their city. His wife is active in their local Educational Foundation.

B. SEF EXECUTIVE DIRECTOR (ED) POSITION APPROVED BY BOARD (BOE) APRIL 20, 2010- Lee reminded the Board of the letter we unanimously voted to send to the BOE and the Superintendent and her Cabinet at the last meeting re: the timeline for hiring of the SEF ED we had proposed. This letter and the proposed ED Job Description were on the BOE agenda last night. Dr. Parks has called the San Marino Superintendent last week and finally gave Janet Reece, the HR Director, the go-ahead to work it out with us. Lee, Pat and Irene worked with Janet Reece. The final proposal is this: SGUSD will give up to \$6,000.00 for single person HMO and Dental and Vision coverage. SEF will cover statutory benefits, (FICA, Social Security, etc.) and salary. The job will be posted on the EdJoin website soon. Lee checked, the position is not posted yet. The person is to be chosen by June 1, 2010. The BOE passed this item as proposed. This person will be chosen by a panel of SGUSD and SEF members and will serve under the direction of the SEF President and Board. It is a good package; now all we need is the right person. Pat and Lee will do the paper screening and interviews as the SEF component.

C. BARBARA GORTON POSITION UPDATE- Pat spoke with Dr. Parks and, at this time, Barbara will be kept on. SEF pays half and SGUSD pays half her stipend and supplies. Barbara has been informed that if the newest budget from the State requires more cuts, her position may be at risk.

D. OTHER- None

NEW BUSINESS-

A. PLANS FOR SEF's FUTURE- Pat announced that we would have a better idea of how many applicants there are for the post of SEF ED by May 27th. Then we can begin to make plans. Lee explained what typically happens with the SGUSD hiring process- say there are 150 applicants; 1) there is a paper screening of applicants, then 2) the list is whittled down to 8-10 for the first face-to-face interviews, then, 3) those are whittled down to 2-3 for the final interviews. Pat was thinking that the group to do the paper screening would be her and Lee, Janet Reece and, perhaps, Harriet Rothschild. The first interviews, hopefully on May 31st, would be done by Pat, Lee, Janet Reece, Leslie Crunelle and possibly, a BOE member. The final interviews

would have the same panel and, hopefully, Colleen Fitzpatrick, ED for the San Marino Schools Foundation Pat will inform to PTA presidents and those people who indicated that they have someone to recommend Jan suggested informing the teachers at each site, in case they know someone. Pat will see if Janet can help with disseminating this information.

B ANNIVERSARY TRIP- Pat and Lee are going on a trip to celebrate their 49th anniversary, May 6-23 They will take the train to Eugene, Oregon. De-train and rent a car, visit a friend in Lincoln City, Oregon. Then they will continue up the coast to Port Townsend, WA and catch a ferry to San Juan Island. They will stay at the Hotel D'Haro on Roche Bay a few days, then drive back down the coast on Highway 5 to Eugene. Then they will catch the southbound train and arrive home on Sunday, May 23rd.

C. The next Board of Directors meeting will be on Thursday, May 27, 2010, 7 p.m. at the Freeman's home

D. Other- Nothing

ADJOURNMENT- The meeting was adjourned at 7:58 p.m.

Respectfully submitted,


Recording Secretary

SAN GABRIEL EDUCATIONAL FOUNDATION

FISCAL PERIOD JULY 1, 2009 THROUGH JUNE 16, 2010

RECEIPTS

CAPITAL CAMPAIGN	\$ 22,690.08
MISSION CAR WASH	\$ 2,091.28
INTEREST EARNED	\$ 86.39
SUB TOTAL	\$ 24,867.75
2009 SUMMER SCH. ENRICHMENT	\$ 3,576.00
2010 SUMMER SCH. ENRICHMENT	\$ 128,073.00
TOTAL RECEIPTS	\$ 156,516.75

DISBURSEMENTS

2008 GRANT	\$ 2,432.44
2009 GRANTS	\$ 48,309.26
INSURANCE	\$ 387.00
BANK CHARGE	\$ 31.50
MISCELLANEOUS	\$ 503.62
POSTAGE & BOX RENTAL	\$ 1,662.82
PRINTING	\$ 6,120.76
SUBTOTAL	\$ 59,447.40
2009 SS ENRICHMENT - EXP	\$ 31,830.45
2010 SS ENRICHMENT - EXP	\$ 484.09
TOTAL DISBURSEMENTS	\$ 91,761.94

BANK ACCOUNTS

CHECKING	\$ 32,667.15
MONEY MARKET	\$ 114,309.23
CERT. OF DEPOSIT	\$ 41,425.62

TOTAL BANK ACCOUNTS \$ 188,402.00

Subj: **Checks for approval**
Date: 6/16/2010 3:27:49 P.M. Pacific Daylight Time
From: pactuber1@mac.com
To: sefpat@aol.com

1231 200.00 Wayne DePry Audit two years
1232 1110.52 SGUSD Grant
1233 484.09 J. Avakian 2010 Sch Enrichment Expense
Total \$1,794.61

Les Fedor, Treasurer

SEF 2010 - 2011 TENTATIVE DISBURSEMENTS
(Excludes SEF Tuition Summer School Results)

Tentatively Previously Approved by the SEF Board

SEF Executive Director 2010 -2011	\$25,000
Barbara Gorton for Instructional Media Lab (IMC)	5,600
Designated Contributions as of 6/16	16,737
D & O Insurance (Nuccio)	400
Organizational Expenses: Postage, Printing, Supplies, P.O. Box etc. (not yet approved by SEF Board)	<u>10,000</u>
Sub total	\$57,737



SEF Board of Directors Meeting, Wednesday, June 30, 2010
 Freeman Home, 537 Gerona Ave., San Gabriel at 7 pm

NAME (Printed Please)

Hours

1. Pat Freeman 24

2. FEDON, LESLIE 18

3. [Signature] Katherine Fleire

4. LEE FREEMAN 20

5. _____

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Pat Freeman

San Gabriel Educational Foundation

BOARD OF DIRECTORS MEETING AGENDA
Wednesday, June 30, 2010, 7 PM,
Freeman Home

WELCOME: Pat Freeman

MINUTES of June 16, 2010: Irene Chapman, Recording Secretary (Thanks to Jan Stowell)
Need a volunteer to take minutes in Irene's absence (*Lee*)

TREASURER'S REPORT: Les Fedor (Bills to Ratify)
Auditor Reports for 2007- 2008 and 2008-2009 Completed

CORRESPONDING SECRETARY: Diana Fagan

OLD BUSINESS

- A. CAPITAL CAMPAIGN UPDATE - Pat Freeman
- B. SEF/SGUSD 2010 SUMMER SCHOOL TUITION PROGRAM UPDATE - Lee Freeman

NEW BUSINESS

- ✓ A. SEF EXECUTIVE DIRECTOR SHERYL MACPHEE - Pat Freeman
Come and meet her on August 19, 2010 for a meeting & dessert
- ✓ B. YEAR END SEF DESIGNATED CONTRIBUTIONS - Pat Freeman
Recommend approval for additional designations
- ✓ C. ROSTER OF BOARD OF DIRECTORS TRANSITION TEAM 2009-2010
- ✓ D. OFFICIAL APPOINTMENT OF LEE FREEMAN AS CHAIR OF THE SEF/SGUSD
SUMMER SCHOOL TUITION PROGRAM *approved*
- ✓ E. OTHER -
- F. ADJOURN

**NEXT MEETING AUGUST 19, 2010, 7 PM, FREEMANS AND
MEET OUR NEW SEF EXECUTIVE DIRECTOR SHERYL MACPHEE**

**THANKS FOR ALL YOUR GREAT SUPPORT THIS YEAR!
HAPPY SUMMER!**

San Gabriel Educational Foundation
Board of Directors Meeting Minutes
Wednesday, June 16, 2010

The meeting was called to order by President Pat Freeman at 7:08 p.m..

Present: Pat Freeman, Lee Freeman, Katherine Kleine, Diana Fagan, Les Fedor, Jan Stowell

Absent: SGUSD Liaisons Philip Hu and Scott Svonkin, Irene Chapman

MINUTES: The minutes of the April 22, 2010 meeting were approved as self-read.

TREASURER'S REPORT: Les reported that the attached report is a preliminary one for the fiscal period from July 1, 2009 until June 16, 2010. It will be audited at the end of the month. Wayne DePry is almost finished with our audit. Pat noted that he is very thorough. Pat distributed our three checks for approval, totaling \$1794.61. See attachment. Diana Fagan moved that we approve these checks and it was seconded by Katherine Kleine. These motions were approved and the checks were ratified.

CORRESPONDING SECRETARY: Diana Fagan read three pieces of correspondence. \$100 was donated to SEF in the names of Pat Freeman, Lee Freeman, and Irene Chapman for their years of selfless service to the Coordinating Council. A letter was received from Barbara Gorton, in thanks for SEF's funding of the Media Curriculum Lab. A note with a \$200 donation to SEF was also received from Val and Bill Loskota.

OLD BUSINESS:

A. CAPITAL CAMPAIGN UPDATE- Pat explained the (attached) SEF 2010 Donor Designated Contributions spread sheet that she prepared. The \$10,000 Capitol Campaign donation that SEF had received from Silver Creek/Brett Bashaw, a SGUSD vendor, was designated toward the following categories: GHS Art: \$500, Speech/Debate: \$500, GHS AVID \$1,500, JMS AVID: \$1,500, Mock Trial \$2,500, with the remaining \$3,000 to be undesignated and used "as needed." We will also be funding to SGUSD programs \$16, 737 in designated donations. Including \$5,000 for 4th Grade Music at all the elementary schools. See attachment.

B. SEF/SGUSD 2010 SUMMER SCHOOL TUITION PROGRAM UPDATE-Lee gave us a snapshot of the preliminary figures (see attached.) There are a total of 516 K-12 students presently enrolled, with tuition payments of \$128,073. The numbers are subject to adjustment, due to refunds, new sign-ups, and cancellations. This is a higher number of students than we have had previously, due to the high school enrollments. We also did not charge as much as other districts for tuition. We do not have an educated estimate of expenses (salaries, etc.) yet. The MOU (Memo of Understanding) between SEF and SGUSD has us paying for more than the teachers' salaries this year. We must also pay for the Elementary Principal and a Crossing Guard at McKinley School. An Administrator and Clerk job was eliminated, though. A teacher's salary was approximately \$2,500-2,600 in the summer of 2009. Tuition costs received this summer were between \$225-\$275 per student. Last year SEF

made \$24,000 and Lee predicts that we may make \$24,000 in this third year of tuition summer school, not including administrative costs. Pat informed us that there is a Summer School Survey on the SGUSD home page website, thanks to Kimberly Garcia, a Washington parent. Lee continued to explain that the "MOU" said SEF pays for teachers, substitutes, the elementary principal, and part of the middle school principal. SEF does not pay for custodians and daily maintenance, facility upkeep. The MOU Addendum stated SEF will also pay for the High School Summer School Principal and clerk.

NEW BUSINESS

- A. SEF Executive Director Recommendation- Pat explained that SEF and SGUSD had paper-screened 16 applicants, which was reduced to 12 people due to missing requirements. The SEF Board had a lengthy confidential discussion regarding the applicants that were asked to come back for interviews. As a Board, we heard an unbiased description of the qualities of the candidates and how they would best meet SEF's needs. Katherine Kleine moved that we accept Sheryl MacPhee as our favored SEF Executive Director. Katherine will write a letter from the Board stating our strong desire to have the SGUSD School Board's approval of Sheryl MacPhee as the outstanding candidate. This is a SEF/District management position. SEF's responsibility is \$25,000 and SGUSD is contributing up to \$6,000 for one person health benefits, an office and a lap top computer.
- B. Les Fedor seconded the motion and it was unanimously voted upon and decided that Sheryl MacPhee be approved, due to her experience, on-going interest in SEF, maturity, and proven track record with other schools foundations, such as South Pasadena and Encinitas.
- C. YEAR END SEF DESIGNATED CONTRIBUTIONS-(see attached list.) Lee walked us through the SEF 2010-2011 Tentative Disbursements numbers. We are in good shape to cover our commitments of \$57,737, but it all depends on Summer School cancellations, etc. Our "MOU" with the district has a CAP on it, so the worst thing they can do to SEF is be billed for \$128,000. We won't go in the hole. We should have some NET, perhaps \$25,000, after summer school ends. This process is still much easier than SEF putting on a big fundraiser/dinner/auction, as we have in the past. We will wait to see if we have any other bounced checks before we send the refunds. SEF will be paying for 80% of the Executive Director's salary.
- D. ADJOURNMENT- The meeting was adjourned at 8:20 p.m.

Respectfully submitted,

Jan Stowell
Substitute Recording Secretary

SEF 2010 Donor Designated Contributions

Teach er Grant (1)	ART GHS (2)	ART JMS (3)	Speec h/ Debat e (4)	AVID GHS (5)	AVID JMS (6)	Music GHS (7)	Music JMS (8)	Music K-5 (9)	Drama GHS (10)	ASB JMS (11)	GATE K-8 (12)	Mock Trial (13)	History Day (14)	
\$25	\$5.00	\$100	\$50	\$100	\$100	\$50	\$50	\$25	\$250	\$25	\$50	\$125	\$125	
\$25	\$50	\$125	\$500	\$120	\$10	\$250	\$25	\$500	\$100		\$20	\$100	\$100	
\$50	\$27		\$40	\$100	\$100	\$25	\$100	\$50	\$20		\$100	\$5.00	\$250	
\$100	\$100		\$25	\$1,500	\$1,500	\$10	\$25	\$150	\$20		\$30	\$150	\$80	
\$50	\$150		\$25	\$25	\$100		\$200	\$500	\$100		\$25	\$25	\$25	
\$25	\$20			\$20	\$100			\$30	\$50			\$25		
\$100	\$10							\$25	\$50			\$75		
\$25	\$10								\$10			\$2,500		
\$25	\$500	\$500						\$25				\$5		
\$100								\$25				\$25		
								\$20						
								\$100						
								\$200						
								\$100						
								\$100						
								\$50						
								\$50						
								\$50						
								\$50						
								\$25						
								\$25						
								\$50						
								\$100						
								\$400						\$3,000
								\$300						
\$525	\$872	\$725	\$640	\$1,865	\$1,910	\$335	\$400	\$5,000	\$600	\$25	\$225	\$3,035	\$580	
Stays	\$1,000	1,000	\$1,000	\$2,000	\$2,000	\$500	\$500	\$5,000	\$1,000	\$25	1,000	\$4,000	\$1,000=	\$20,025
Silver Creek	In yellow	for	\$10,000	Gift						Total of.	Cols.	1-14 =	\$16,737	

SEF

ESTIMATE OF FINANCIAL PROJECTION FOR 2010-2011

CURRENT CASH ON HAND	\$188,400 (includes Summer School fees)
EXPECTED PAYABLES	95,000 Summer School salaries, including S.S. principal, clerks, class materials
	25,000 (set-aside for Exec. Director cost)
	5,600 (contribution to SGUSD for IMC)
	20,000 (earmarked out-go, re donor designated)
	400 (Insurance premium, due 9/1/10)
	400 (professional services; i.e. auditor and tax forms preparation)
	1,000 (new SEF banner)
	<u>11,000</u> (miscellaneous: brochure, office supplies, expenses for Executive Director, postage)
TOTAL EXPECTED PAYABLES:	\$158,400
PROJECTED CASH ON HAND AFTER PAYABLES	\$ 30,000

Note: Figures are current estimates,
rounded off.

June 30, 2010

Prepared by Lee and Pat Freeman

SEF BOARD OF DIRECTORS ROSTER FOR July 1, 2009 - June 30, 2010

6/26/2010

Last Name	First Name	Address	City	Zip Code	Affiliations	Phone Number	E-mail	Cell Phone
Chapman	Irene	524 N. Gerona Ave.	San Gabriel, CA	91775	SEF Recording Secretary BAIC Committee Community Member	(626) 285-4604	ibchapman@earthlink.com	(626) 627-4822
Fagan	Diana	6448 Golden West	Temple City, CA	91780	Teacher Rep Gabrielino SEF Corresponding Secretary	(626) 446-2324	faganspap@yahoo.com	N/A
Fedor	Les	8347 Santa Ynez St.	San Gabriel, CA	91775	SEF Treasurer Masons Community Member		pactuber1@mac.com	(626) 872-1114
Freeman	Lee	537 N. Gerona Ave.	San Gabriel, CA	91775	13 year Past Member Board of Education San Gabriel Rotary Community Member	(626) 287-6730-(H)	Scroogedad@aol.com	(626) 388-0940
Freeman	Pat	537 N. Gerona Ave.	San Gabriel, CA	91775	SEF President San Gabriel Rotary Community Member	(626) 287-6730-(H)	Seffpat@aol.com	(626) 388-6749
Hu	Phillip	518 Anderson Way	San Gabriel, CA	91776	BOE Liaison to SEF Teacher Cerritos College	(626)	Phu@cermitos.edu	(626) 943-9016
Kleine	Katherine Martinez	601 N. Mission Dr.	San Gabriel, CA	91775	SEF Teacher Grants Tournament of Roses Found. Bd., Naturopathic Drs. Assoc. Exec. Director	(626) 576-2300	kmkleine@sbcglobal.net	(626) 450-4846 485-4845
Stowell	Jan	509 N. Gerona Ave.	San Gabriel, CA	91775	Parent Jefferson M.S. Teacher Rep McKinley SEF Vice President Community Volunteer	(626) 286-9196	JTSTOW@aol.com	(626) 824-0169
Svonkin	Scott	215 N. Bradbury	San Gabriel, CA	91775	BOE Liaison to SEF County Demo Com Parent Coolidge School	(626) 457-1836	Scott@svonkin.com	(818) 915-3636

408 Junipero
Serra Dr. #119

SG

91776

