

**SAN
MARINO
SCHOOLS
FOUNDATION**
Empowering Excellence.

**ANNUAL
R&P
REPORT**
2023-2024

Michael & Thayer Chang	Eric Fowler '73	Palmieri Family Chantia '86 Roni '88 & Marco	Todd & Mindy Hsu '85	Henry Family Kerlin '84 Jason '87 Ryan '90 Courtney '94	The Weiss Shirley '80 Karinne '93 Jason '95	Teri & Bryan Palmiti & Family	The Huntington School Willy Love, Stanley Wu, Beverly Wu	Stuart Min '95 Warren Min '98 Norman Min '96	The Presents Seth '83 Sean '85 Jason '89 Justin '92	Lee Michael Diaz '82	Chang Family Ming, Alan, Ben & Lisa '91 & '92
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Arin Sawanda & Kiki Karna '91 & '93	Scott & Tiffany Heitnerbrater '75 & '78	We love our school Catherine L30 Timothy Lai	The Barbers Alan '87 Holly '89 '91 '92 '93 '94 '95 '96 '97 '98 '99	The Jerry Hank Family Jaques '95 Jonathan '96	The DiGiovanni Family	San-Yueng Shiu Pui-Ming Shiu Henry School Days	The Rozdy Family	Henry Ma '90 William Ma '95	Waterman Family Sara '72 Jason '79 Catherine '83	The Gai Family Mark '84 Justin '84 Matt '89	The Irving Family Mary '77 Will '79 Sara '79 Carol '80
James Di Wu '93 Jou Wu '97	The Twigg Family Kathleen '93 Laurence '94 Yvonne '96	The Tsung Family James '91 David '94	The Truong Kristina '93 Laurence '94 Yvonne '96	Home & David Cameron '96 '92	Hsu Family Joe '89 John & Nancy Allison & Peter David '94 '97	The Fitzpatrick Family	The Rozdy Family	Waterman Family Sara '72 Jason '79 Catherine '83	The Gai Family Mark '84 Justin '84 Matt '89	The Irving Family Mary '77 Will '79 Sara '79 Carol '80	The Huntington School Willy Love, Stanley Wu, Beverly Wu
James Di Wu '93 Jou Wu '97	The Twigg Family Kathleen '93 Laurence '94 Yvonne '96	The Truong Kristina '93 Laurence '94 Yvonne '96	The Truong Kristina '93 Laurence '94 Yvonne '96	Home & David Cameron '96 '92	Hsu Family Joe '89 John & Nancy Allison & Peter David '94 '97	The Fitzpatrick Family	The Rozdy Family	Waterman Family Sara '72 Jason '79 Catherine '83	The Gai Family Mark '84 Justin '84 Matt '89	The Irving Family Mary '77 Will '79 Sara '79 Carol '80	The Huntington School Willy Love, Stanley Wu, Beverly Wu



Our Mission



For 44 years the San Marino Schools Foundation (SMSF) has provided supplemental financial support to the San Marino Unified School District (SMUSD), empowering the objective of delivering a world-class education with recognized excellence in academics, arts, athletics, and activities.

By providing safe, supportive environments and innovative opportunities for student learning, SMUSD promotes individual student excellence, invites collaboration and discovery, and challenges students to take responsibility as members of a diverse, global community.

The SMUSD goals and objectives are:

- to be on the leading edge of excellence in academics, arts athletics, and activities,
- to maintain long-term fiscal health,
- to thoroughly integrate technology, and
- to improve and enhance communication strategies.

SMSF proudly supports these objectives in our fundraising efforts.

**SAN
MARINO
SCHOOLS
FOUNDATION**
Empowering Excellence.

With Our Gratitude

We are proud to share with you our 2023–2024 Annual Report, which showcases the impact of your generosity and collective commitment to advance educational excellence in SMUSD.

In its 44th year, the Foundation remains dedicated to the trusted stewardship of our loyal donors and community partners. As a result of your commitment to enhance educational and student opportunities, we awarded over \$2,000,000 in grants to SMUSD including scholarships and endowments to benefit students and teachers.

Thank you to every single person who made a donation to our school this year. As we look to the future, we are inspired by supporters like you continue to build opportunities in excellence for SMUSD students.

With gratitude.

Your 2023–2024 San Marino Schools Foundation Trustees



The Need

San Marino Schools do more with less...

For decades our schools have been ranked among the very best in California. San Marino alumni are found at top colleges and universities and make their way to leadership roles in all fields: business, science and technology, medicine, law, arts and academics.

Forty-four years ago...

in the wake of Proposition 13 and state cuts to school funding, concerned community members established the San Marino Schools Foundation. By focusing philanthropy on supporting local needs, the Foundation continues to provide vital support to our schools. The District does not qualify for many state and federal education funds because of the high educational and income levels of district families and the exceptionally high achievement level of its students. These funding impediments remain today.

San Marino Schools...

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

Great schools anchor our community...

San Marino holds a tradition of educational excellence and valuing its schools. The success of our students and schools is a source of civic pride and has attracted families to San Marino for generations. Parents, community members, and local business have stood up and generously backed our students and schools with financial support and with volunteer spirit.

Based on this strong history...

the Foundation's role has progressed to become one of leadership. The Foundation is increasing its focus on deepening relationships with each school campus, building strong ties of support and engagement with parents and residents, and securing the legacy of a quality San Marino schools experience into the future!

2023-2024

statistics

20

certificated positions supported

1421

total donors

81%

of dollars donated by parents

432

community members donated

\$64 million

total SMSF donations since 1980

100%

students benefiting from SMSF support

Giving Made Easy

PLANNED GIFTS

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

ALUMNI CLASS GIFTS/ENDOWMENTS

The Foundation encourages San Marino alumni to create endowed funds in the name of their class. Such gifts will provide ongoing support benefitting future students and can be matched to the interests of the class. These endowments can be refreshed at key reunions and reflect the legacy of a class in the history of San Marino Schools to “pay it forward” to future generations of kids.



GIFTS OF STOCK/MANDATORY IRA DISTRIBUTIONS

A gift of appreciated stock/securities or mandatory IRA withdrawals is a very effective way to give. This type of giving can be combined with an endowment or a personalized giving approach. Contact the Foundation office for details.



GRANDPARENTS/EXTENDED FAMILIES

Grandparents and extended family play a key role in contributing to our per student need. Many are among our most generous donors. We are happy to reach out to those you know and share the impact they could make on our funding needs.

DONATE A VEHICLE

If you have a vehicle that you no longer use or are close to retiring, contact us for assistance in turning your old wheels into a gift for our schools.

MATCHING GIFTS

Double your donation! Check with your employer to see if they participate in a matching gift program.

ONLINE

To make a one-time or recurring donation by credit card, visit smsf.org/donate.

BY PHONE

Contact the SMSF office at 626.299.7014

BY MAIL

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

RECURRING GIFTS/MONTHLY INSTALLMENTS

A recurring gift is an easy, affordable way to empower excellence in our schools. A yearly pledge can be charged monthly, quarterly, or annually to your credit or debit card. Contact our office for assistance.

TELL A FRIEND

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



SMHS Class of 2024

AP Courses Offered: 21
AP Exams Ratio: 2.5 exams/student
ACT Average Score: 30.9
SAT Average Score: 1362

Percentage of AP Exam scores of 3 or higher:

93%



7

PASADENA CITY COLLEGE DUAL ENROLLMENT CLASSES

177

SMHS STUDENTS ENROLLED IN 23-24 PCC DUAL ENROLLMENT

SAN MARINO HIGH SCHOOL GRADUATES WHO WENT ON TO HIGHER EDUCATION

98%

SAN MARINO HIGH SCHOOL GRADUATES RECEIVED 75 OFFERS FROM UC CAMPUSES INCLUDING

9

FROM UCLA

14

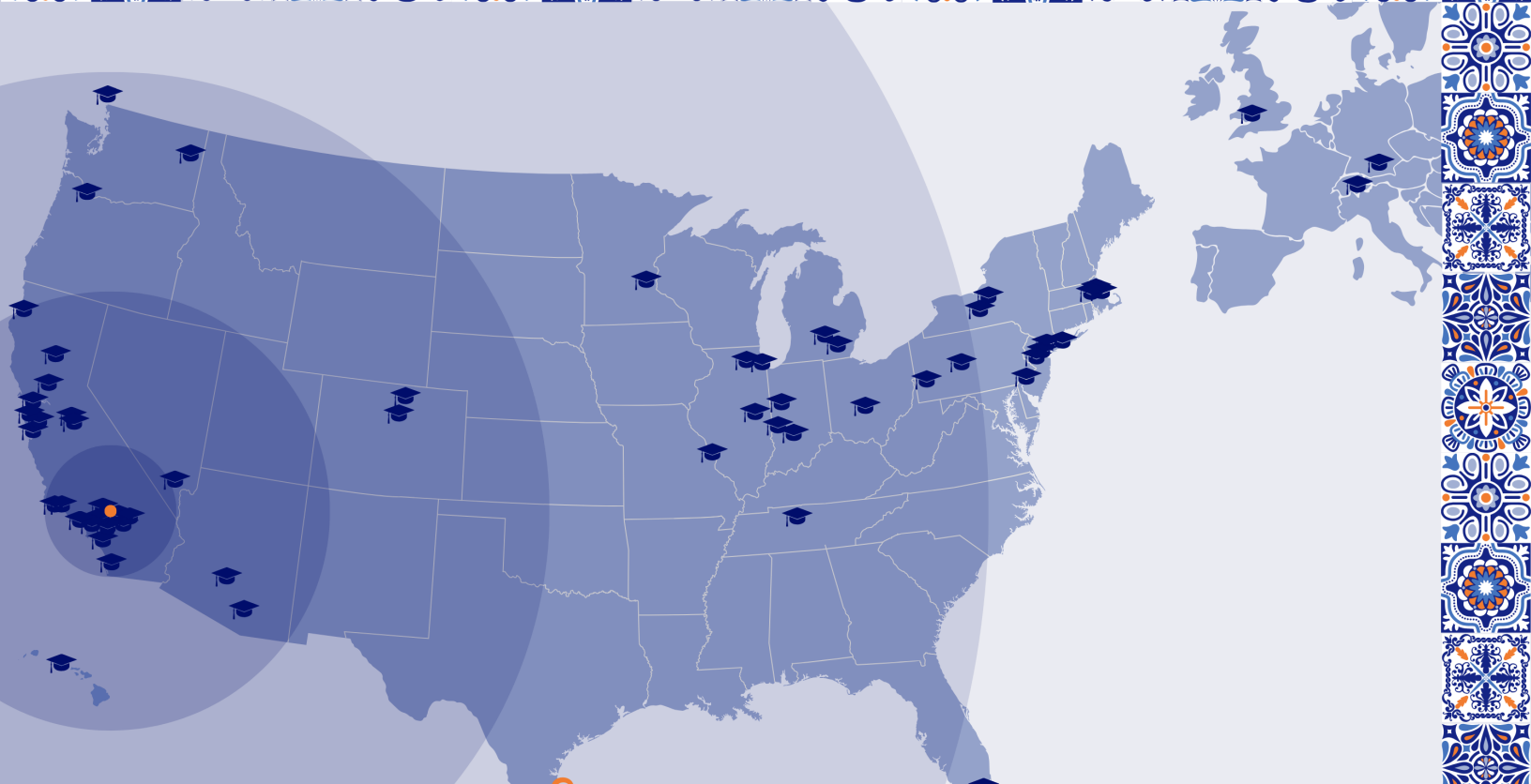
FROM UCSD

13

FROM UCSB

12

FROM UC BERKELEY



SMHS Class of 2024 College Destinations



Adelphi University
 Barrett Honors College, ASU
 ArtCenter College of Design
 Babson College
 Boston University
 Cal Poly - Pomona
 Cal Poly - Humboldt
 CSU - Chico
 CSU - Fullerton
 CSU - Los Angeles
 CSU - Northridge
 Carnegie Mellon University
 Chapman University
 Citrus College
 Colorado State University
 Cornell
 EHL Swiss School of Tourism
 & Hospitality
 Harvard University
 Indiana University Bloomington
 Indiana University
 Iona University
 Loyola Marymount University
 Merced College
 Michigan State University
 Mt. San Antonio College

New York University
 New York University - Shanghai
 Northeastern University
 Occidental College
 Ohio State University
 Pasadena City College
 Penn State Schreyer Honors College
 Pepperdine University
 Pitzer College
 Purdue University
 Reed College
 Rio Hondo City College
 Rose Hulman Institute of Technology
 Rutgers University
 Santa Barbara City College
 Santa Clara University
 Stanford University
 Stony Brook University
 Syracuse University
 Technical University of Munich
 The Masters University
 New England Conservatory
 University of British Columbia
 University of Arizona
 UC - Berkeley

UC - Davis
 UC - Irvine
 UC - Los Angeles
 UC - Merced
 UC - Riverside
 UC - San Diego
 UC - Santa Barbara
 UC - Santa Cruz
 University of Chicago
 University of Colorado Boulder
 University of Hawaii
 University of Illinois
 University of Miami
 University of Michigan
 University of Minnesota
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 University of Pennsylvania
 University of Southern California
 University of South Wales
 Vanderbilt University
 Washington University in St. Louis
 Wellesley College
 Westmont College
 Wheaton College
 Whittier College
 Whitworth University

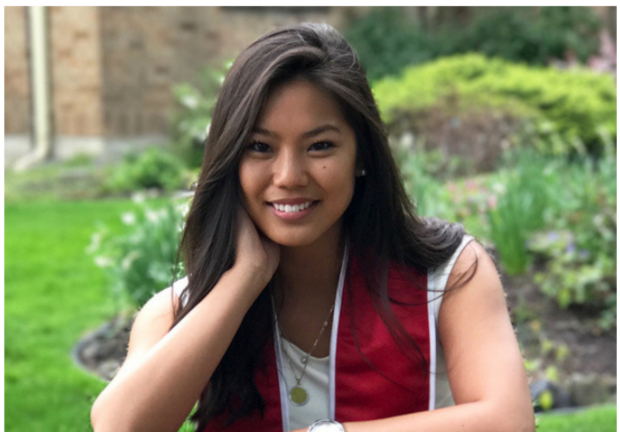


SM&SF Endowments

THE POWER OF PERPETUITY

One of the easiest ways to make a lasting impact on the future of San Marino Schools is to create an endowment that provides long-term funding to meet a specific need. The positive impact of a donor's generosity is magnified indefinitely through continued growth and creates a legacy of philanthropy that can benefit many subsequent generations. Our San Marino High School community is fortunate to have two such endowments, created by donors who wanted to support current and future Titans in perpetuity. Their generosity makes a significant annual impact on both graduating seniors and San Marino High School at large.

THE LESLIE NOELLE LIENJUN MAR MEMORIAL SCHOLARSHIP



The Leslie Mar Scholarship was established in 2018 by Patricia and Harry Mar of San Marino who wanted to honor the legacy of their daughter Leslie Mar, an accomplished young woman and SMHS graduate of 2013, who tragically lost her life in a hiking accident. Leslie's life and achievements are memorialized each year by awarding scholarships to graduating seniors of SMHS who demonstrate well-rounded excellence in Academics, Athletics, and the Arts.

The recipients in the Class of 2024 were Melody Chen, Adrian Huang, Patrick Samson, and Malia Yu. They represent an accomplished array of activities at San Marino High School including Marching Band, basketball, volleyball, National Charity League, Rotary Interact, Robotics, ASB, Science Olympiad and Dance Company. Each of them received a \$1000 scholarship for college and are attending esteemed universities such as UCLA, Cornell, Cal State-LA, and Boston University. To date, the Leslie Mar Scholarship has granted \$22,000 to graduating seniors since 2019.





THE RICHARD AND ERIC DONG ENDOWMENT FUND

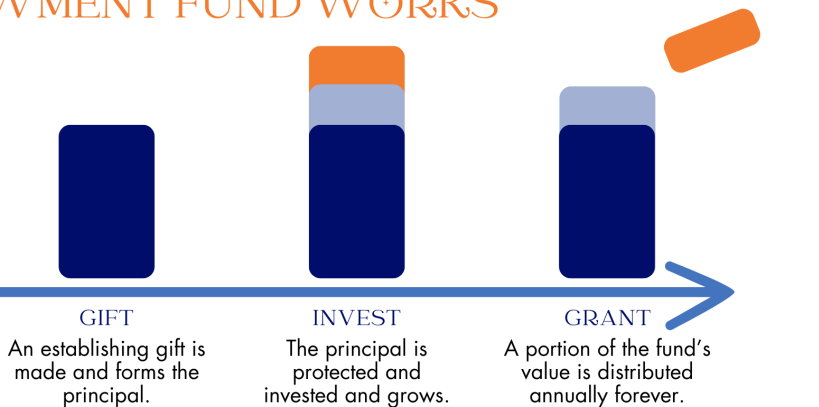


Established in 2017 by Richard (SMHS Class of 2019) and Eric (SMHS Class of 2020) Dong, the Richard and Eric Dong Endowment provides an opportunity for SMHS teachers, athletic teams, clubs, and organizations to have access to supplemental funding to support their activities and grow the excellence for which San Marino High School is known. Grants are funded in different categories to distribute financial support to multiple areas of campus life. Last year, the endowment was able to support the refurbishment of the Staff Lounge, which was celebrated with a ribbon-cutting ceremony in August, 2024.

This year's grants were given to the Titan Varsity/JV Football Team, Girls Volleyball Team, Girls Soccer Team, Girls Basketball Team, SMHS Speech & Debate Team, Titanium Robotics, SMHS Interact Rotary Club, and scholarships for student leaders to attend the International Leadership Foundation Student Workshop in September. To date, the Richard and Eric Dong Endowment has granted \$19,425.55 to benefit San Marino High School.



HOW AN ENDOWMENT FUND WORKS



CREATE YOUR LEGACY

Restricted endowments are the preferred philanthropic vehicle for creating ongoing, focused benefit to San Marino Schools. Donors interested in establishing an endowment with the San Marino Schools Foundation should contact Kathryn Oliveros at the Foundation office to discuss ways that the Foundation can help support your long-term vision for San Marino Schools.



In The Community



From Back-to-School Nights to Pi Day, the 2023-24 school year had many opportunities to meet, thank and celebrate our donors and our community.

Our New Family Reception, on the Pomegranate Patio of the Old Mill, in September, 2023 helped kick-off our school year. Throughout the year, we joined our friends at each school site PTA for class coffees, PTA meetings, Showcase nights, and more. We visited MeloMelo for the sweetest treat that gives back. We paraded down Huntington Drive to celebrate our Titans on Homecoming Day. We thanked all of our donors with delicious pies at our new Piece of the Pi Day event on March 14, 2024. And finally, in May, we celebrated our donors at our annual Donor Recognition Party. SMSF Trustees hosted a festive Cinco de Mayo fiesta with delicious food, drinks, music and fun activities. With over 200 families in attendance, we were able to host and thank more donors than ever before.

To all our hosts and donors, we say thank you!



Building Leaders

In addition to supporting fundraising and campaign efforts throughout the year, the San Marino Schools Foundation was proud to provide eight outstanding San Marino High School students with the opportunity to participate in a Student-Leader Internship Program.

For the program's second year, Freshman Harvey Chang, Sophomore Kyle Huang, Junior Alice Tang, Junior Ellie Vitan, and Junior Valeri Zhu joined returning interns Sophomore Ryan Ke, Junior Kenzie Chu, and Senior Bryce Huang to work with Foundation staff and trustees focusing on leadership development and nonprofit business operations.



Collectively, the interns worked 248 hours to support Foundation programs and events, including a new alumni engagement campaign, social media and marketing efforts, supporting New Family Orientation, Pi-Day, Yard-Sign Distribution, and the Annual Donor Party. Interns also participated in multiple outreach events, serving as Foundation ambassadors to their fellow students and the San Marino community in the Chinese Club's Lunar New Year Festival at Lacy Park, the SMHS Internship Fair, and the HMS and SMHS Showcase Nights.

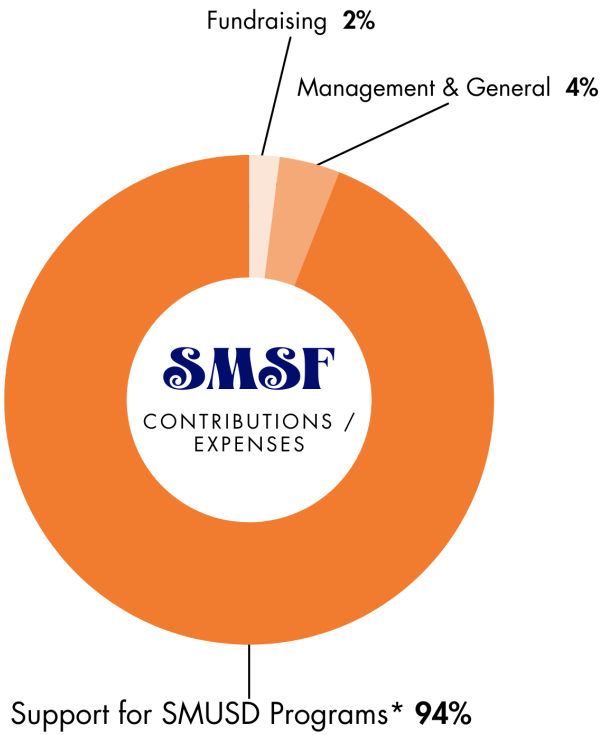
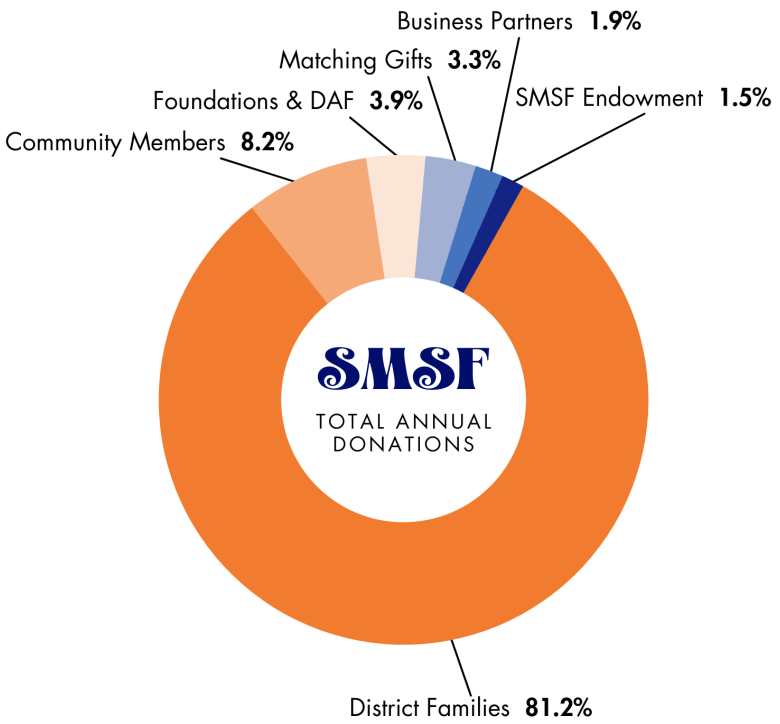
As part of the Foundation's commitment to their development, all interns participated in a customized leadership curriculum that included workshops on valuable life skills such as Conflict Resolution, creating a SMSF and personal "elevator pitch", Myers-Briggs personality types, and the Power of Networking, which included resume review and creating LinkedIn profiles.

Senior Bryce Huang reflected, "The internship experience presented opportunities to network with families and community members. It also exposed me to the intricacies of the San Marino School District as I learned more about the operations and steps taken to achieve community goals and projects. Most importantly, it made me realize how beneficial the Foundation's work is for not only the district's students but for the overall community."



Financials

2023-2024 IN A SNAPSHOT



Total 2023-2024 Annual Campaign Donations
\$2,094,102

ASSETS:	6/30/24
Cash and Cash Equivalents	\$ 201,199
Endowment Fund	\$ 4,763,551
Other Assets	\$ 6,882
Total Assets	\$ 4,971,632

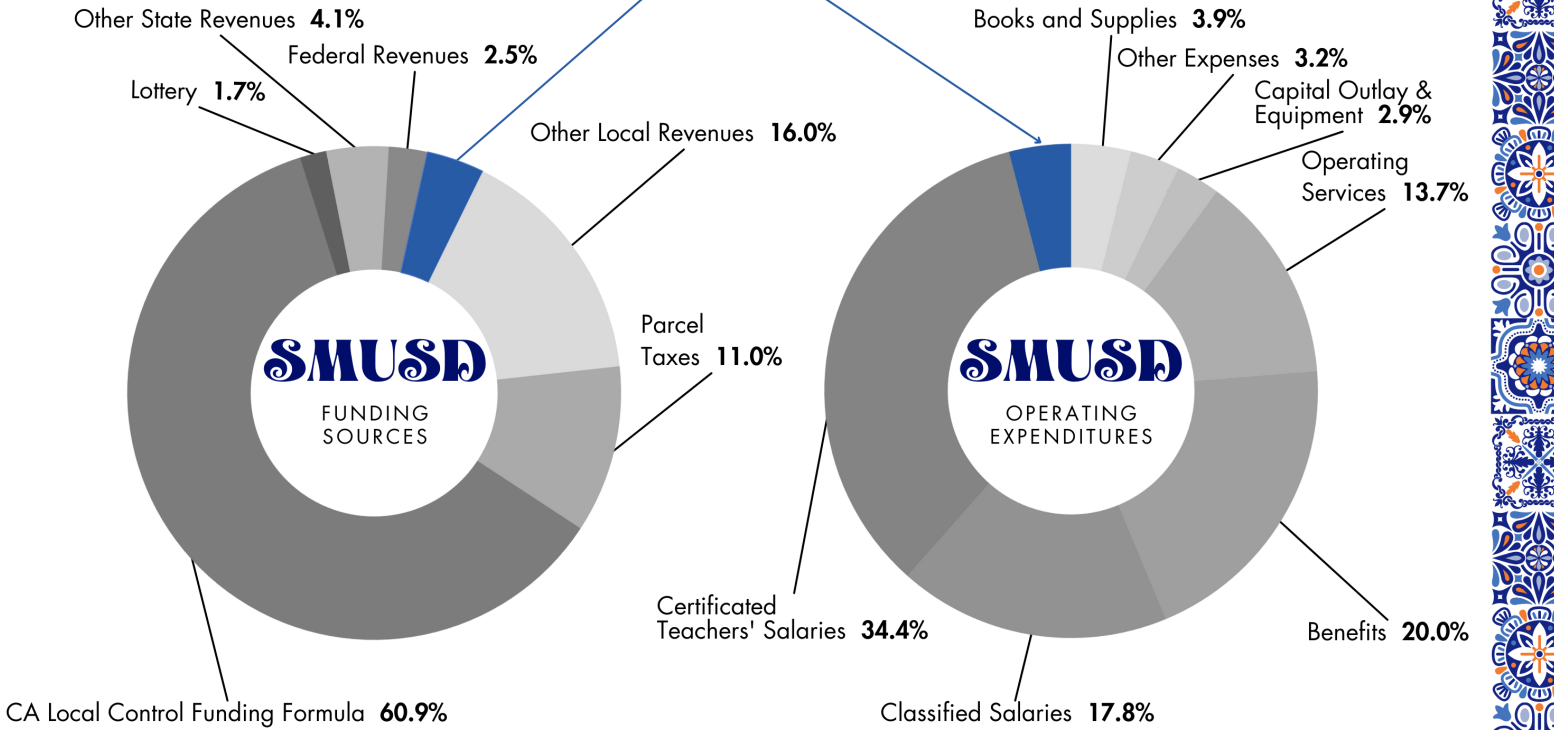
LIABILITIES AND NET ASSETS:	6/30/24
Permanently Restricted	\$ 1,413,968
Temporarily Restricted	\$ 3,367,972
Unrestricted	\$ 175,271
Liabilities	\$ 14,421
Total Liabilities & Net Assets	\$ 4,971,632

STATEMENT OF FINANCIAL POSITION June 30, 2024

SAN MARINO SCHOOLS FOUNDATION
Empowering Excellence.

*Includes restricted funds released to district.

SAN MARINO SCHOOLS FOUNDATION
CONTRIBUTION 4.1%
(This funded 20 TEACHERS out of the year's
Certificated Salaries)



Total 2023-2024 District Funding
\$54,204,430

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

TEN YEARS AGO, the Foundation's Board of Trustees set the goal of applying best practices to all aspects of its operations to increase transparency, elevate accountability, and to properly reflect its 501(c)3 non-profit tax status. To accomplish this, SMSF established a process of awarding grants to the District following

review by a grants committee made up of Foundation Trustees. At the end of each year, the District submits a full report to the Foundation confirming the funds were spent in accordance with the grant requirements.

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

The San Marino Schools Foundation practices full transparency. Audited financial statements are available on our website.

Our Donors

The San Marino Schools Foundation thanks all of the following donors for contributions received from July 1, 2023 to June 30, 2024.

CORPORATE AND ORGANIZATIONAL DONORS

FOUNDER'S CIRCLE



FOUNDER'S CIRCLE
\$10,000 or more

The Capital Group[^]
Chinese Club of San Marino
Corebridge Financial[^]
The WHH Foundation

AMBASSADORS
\$5,000 to \$9,999

California American Water Company
Raytheon[^]
Intercontinental Exchange Inc[^]
Sempra Energy Foundation[^]
TMS Smiles
Walt Disney Company Foundation[^]

AMBASSADORS



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Southern California Edison[^]
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PlayStation Cares[^]
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FRIENDS



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Up to \$499

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[^]Employee Matching Donation

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Nana Chen & Ting Cao
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The Charcie Chan Family*
The Chan Family*
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Apple Tree Family
Dave Chen, Lisa Pan & Ashley*
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The Cheng Family*
Craig & Lesley Cheung
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(parents of Sydney Cho)*
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Yahong Liang*
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& San-Ching Chen	Lavira O. Hall	Lisa & Dave Link	John Ryan & Kimberly Siegmund	Peter & Chong Hong Wu
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