

Compendium of Hari Titan's Data Analysis presented to the Piedmont Unified School District and School Board 2013-2024

New Construction for Alan Harvey Theater



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Notwithstanding the professionalism of XL Construction, the District has concluded that other contractors from the pool would be more committed to achieving a zero-net energy building (or the most energy efficient building possible), and would engage in more vigorous value engineering prior to suggesting reductions in project scope. The Board will consider a new preconstruction services contract with the second-highest-ranked contractor in the pool, Overaa Construction. (March 14, 2018... will download)

District signed a \$ 395,044 contract with XL Construction for a PHS project site analysis (incl. geotechnical and soils investigations); selection of building materials, systems, equipment and construction methods; review construction drawings with HKIT Architects; and coordinate project timeline with a yet-to-be-named district project manager. (Jan 10, 2018... will download)

District refinances 2013 CAB with a hybrid that converts to a CIB in 2023, saving \$26 million in unnecessary compound interest charges. This amounts to an average property tax savings of \$6800 spread over the next 25 years. By utilizing H1 bonding capacity this refinance will not reduce the overall bonding capacity but will increase the parcel tax in 2023-24 to \$150 per \$100k assessed valuation. \$18.8 million of unnecessary interest charges (both compound and simple) are unrecoverable resulting from the 2013 issuance of a CAB with a 10-year no-refinance clause instead of a CIB or hybrid CIB in 2013. (Dec 21, 2017)

School Board considers refinancing 2013 CAB with another CAB (Oct 12, 2017)

Request to prequalify based on qualification scorecard and request for proposals for preliminary and construction services (Oct 12, 2017)... will download

Guide to Bidding and Contracting for School Districts

HKIT Architects present renderings of High School facilities that incorporate zero net energy designs (Sept 27, 2017)... will download

Option 2B is final design concept for Measure H1: Brand new main PHS building, brand new 450-seat theater, extended-day kindergarten, relocated Millennium HS, 3 additional classrooms for PMS ... \$58.6 million in total cost (May 24, 2017)... will download

District sets up town halls to discuss Facility Steering Committee options with public with AHT back on the table (April 2017)

- Thursday, April 6, 12:30 - 2:00pm, Ellen Driscoll Theater, 325 Highland Avenue
- Tuesday, April 18, 7:00 - 8:30pm, PHS Student Center, 800 Magnolia Avenue

Superintendent creates public survey with 3 suggested options for Piedmont High School (March 2017)

As part of the 2016 Measure H1 voter authorization, school board authorizes the issuance of a Current Interest Bond (CIB) for \$26 million (March 22, 2017)... will download

Extended Day Kindergarten Enacted for PUSD (Feb 8, 2017)... will download

HKIT Architects selected as firm to design new Piedmont school buildings

School Board continues process of committee meetings behind closed doors

Post-Election Victory Steps (Dec 12, 2016)... will download

Facilities Planning Journey before passage of Measure H1

H1 Bond Text (June 21, 2016)... Project List Added

Public announcement of H1 Bond Measure (June 15, 2016)

Superintendent Facility Steering Committee Recommendation (May 25, 2016)... will download

True North Survey results (May 2, 2016)... will download

Facilities Master Plan FAQ (March, 2016)

PUSD-FMP-Preliminary-Cost-Estimates (Feb 26, 2016)

Background Presentation to Board (Feb 10, 2016)... will download

Facilities Master Plan (Feb 10, 2016)

Draft Facilities Assessment (Dec 1, 2015)

Draft Education Specifications (Dec 1, 2015)

RFP Regarding Facilities Master Planning Services (May 12, 2015)

Measure H 'constructive' ideas with benefits of new construction



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AHT Project Cost

Submitted by [Hari Titan](#) on Fri, 02/07/2014 - 12:04pm

What is included in the \$14.5 million budget?

The budget includes:

- estimated “hard costs” (the cost of construction);
- estimated “soft costs” (including architectural and engineering fees, fees for design review by the Division of State Architect, construction management fees, inspection and permit fees, utility fees, costs relating to relocation of the theater classroom and performance space, estimated price escalation, and furnishings, fixtures and equipment, including new seating, theater lighting and sound systems); and
- design and construction contingency funds.

The District's architect, Quattrocchi Kwok Architects (QKA), estimates that the hard costs would be approximately \$9.8 million. Vila Construction, the District's Construction Manager, independently reviewed and confirmed the QKA estimate as reasonable. Vila's analysis of the hard costs for the project include: \$8.4 million for construction costs; a 5% allowance (\$480,000) for one year's worth of cost escalation to account for the time period between development of schematic design and completion of the construction documents; and a 15% design contingency (\$1.2 million) to cover any additional construction costs and fees for architectural revisions that might result from plan changes imposed by the Division of the State Architect (DSA) during DSA review. Vila's total estimate is \$10.1 million.

If DSA does not require significant changes to the design, and depending upon actual bids to perform the work, the actual hard costs may be measurably less.

The District, with the assistance of Vila Construction, estimated that the soft costs and other non-construction costs would be roughly \$2.5 million, and that a prudent and appropriate program contingency fund would be \$1.9 million, bringing the project budget to \$14.5 million.

As the District found in renovating both Wildwood and Beach Schools during the SSBP, unknown conditions may exist in AHT that increase construction costs after the start of construction. For this reason, a program contingency fund is needed. Note that design contingency differs from program contingency in that design contingency allows for cost increases before the start of construction, mandated by DSA, and program contingency allows for cost increases due to unforeseen conditions discovered after the start of construction. (The program contingency is discussed below.)

Please note that, even after the budget is established, the District will engage in continual “value engineering” with the architect, construction manager, and builder, to contain and possibly reduce project costs. Value engineering is a process to assess the cost-effectiveness of building systems, products and materials. The District and Vila Construction have a strong record of value engineering during the SSBP.

How does the \$14.5 million budget compare with other school theater renovations?

While each theater is unique in its needs and degree of work, seating capacity, and theater design components, rough cost comparisons can be made on a cost per square foot basis. The following recent theater projects in and around the Bay Area offer some cost comparison.

Hillsdale High School Theater in San Mateo was recently renovated with a lobby and back stage addition. The hard costs were \$13,381,000 or \$669 per square foot (the theater area is 20,000 square feet and holds 770 seats).

San Mateo High School Performing Arts Theater was recently renovated with a lobby addition. The hard costs were \$26,806,000 or \$547 per square foot (the theater area is 49,000 square feet and holds 1,500 seats).

St. Francis High School in Mountain View constructed a theater in 2009 with a construction cost of \$10,787,239 or \$546 per square foot (the theater area is 19,750 square feet and holds 409 seats).

In comparison, the hard costs for renovation of AHT are estimated to be \$9.64 million (in today's dollars without escalation), or \$553 per square foot (the theater area would be 17,424 square feet and hold 365 seats).

Please note that although the seating capacity is different for each of these theaters, many costs (relating to the stage, orchestra pit, lighting and other equipment) are not dependent on number of seats.

Would it be more cost-effective to tear down AHT and build a new theater?

The cost of tearing down the existing facility and building a new theater is estimated to be between \$25 million and \$30 million, based on comparable school theaters that have been built in recent years in El Cerrito, Castro Valley, San Ramon and San Leandro.

How does the estimated cost of AHT compare with the cost to renovate Havens and Ellen Driscoll Theater?

The differences between building or renovating a theater as opposed to a school make side-by-side comparisons difficult. (The same difficulty arises when comparing the cost of remodeling a kitchen with the cost of adding a bedroom.) The hard cost to rebuild Havens Elementary School totaled \$21.1 million, or \$461 per square foot. (Havens is 45,660 square feet.) The total (combined hard and soft costs, excluding interim housing) for the new Havens Elementary School was \$27.4 million. These amounts do not include costs associated with Ellen Driscoll Theater, which has a separate project budget.

The hard costs of the Ellen Driscoll renovation totaled \$1.93 million, or \$371 per square foot. (The building is 5,200 square feet). The total (combined hard and soft costs, excluding interim housing) for Ellen Driscoll was \$2.5 million. Note that this project was not a true theater renovation, but a seismic retrofit project only. Ellen Driscoll did not require the creation of accessible pathways or seating, because the pathways already met the current accessibility requirements and there are no aisles, different seating levels, and no fixed seats in the building. The renovation of Ellen Driscoll focused primarily on strengthening the exterior shell of the building by structurally integrating the outside walls with the building's roof. The Ellen Driscoll project did not include theatrical design that would be found in AHT, such as installing new seats, theater lighting, rigging, or a theatrical sound system. The combined project costs for Havens Elementary School (including Ellen Driscoll Theater) is \$29.9 million.

In comparison, the estimated hard costs of the proposed AHT renovation are \$553 per square foot. (AHT is 17,424 square feet.)

Although the District renovated the Wildwood and Beach auditoriums, these were included with the school's project budget, so no separate per-square-foot cost information is available for those facilities.

Why would renovation of AHT total \$14.5 million when the complete rebuild of Havens totaled \$29.9 million?

Comparing AHT to Havens is an apples-to-oranges comparison. Of all educational facilities, performing arts theaters are the most complex and expensive, and they cost more per square foot than classrooms and even specialized teaching spaces. This is because of the complexity of lighting, rigging, sound and acoustics, mechanical systems, seating, exiting, and orchestra pits. This is the case for new theaters as well as modernization of existing theaters.

Source: <http://www.piedmont.k12.ca.us/news/alan-harvey-theater>

Thoughts?

Tags:

- [AHT](#)

AHT Rebuild Comps

High School / Community Center for the Performing Arts Project		Architect Firm		Builder / Estimator		Bid Building Year SF	Final cost of construction or Estimate of Lowest bid(3)	Constr. Cost/SF (3)	Project Budget, Portion of Bond or Final Project Cost (5)	Total Price/SF	# Seats	Rebuild Fly system
New Construction												
Pinole Valley High, Building B (2)	WLC Architects	Silva Cost Consulting	2015	16,846	\$8,306,435	\$493	\$11,213,637	\$666	600	Yes (electric)		
St Helena High (2)	HY Architects	Silva Cost Consulting	2014	17,300	\$9,931,381	\$574	\$13,063,392	\$755	350	Yes		
El Cerrito High, Building A	WLC Architects	Lathrop Construction	2007	56,061	\$22,580,000	\$403	\$28,000,000	\$499	600	Yes (28 lines)		
San Leandro High (6)	WLC Architects	Zolman Construction	2009	27,931	\$13,200,000	\$473	\$13,783,844	\$493	552	Yes (32 lines)		
Palo Alto High, PAC	DLM Architects	Taisei Construction Corp	2014	29,000	\$19,085,000	\$658	\$24,395,049	\$841	583	Yes		
St Francis High (Mountain View)	HMC Architects	Devcon Construction	2009	19,750	\$10,787,239	\$546	\$12,000,000	\$608	410	Yes (28 lines)		
Average Recent Price/SF (Historic?)		Maximum Price/SF				\$528			\$643			
Alan Harvey Theater (AHT)						\$658			\$841			
District estimate (1)		Piedmont (PUSD)	17,424				\$27,500,000	\$1,578	450?	Yes		
using Maximum Price/SF						\$11,466,794	\$658	\$14,657,218	\$841	450?	Yes	
using Average Price/SF						\$9,197,116	\$528	\$11,209,837	\$643	450?	Yes	
Renovation												
Alan Harvey Theater (4)	Quattrochi Kwok	Vila Construction	2014	17,424	\$12,000,000	\$689	\$14,500,000	\$832	365	Yes?		

Notes:

(1) PUSD: "The cost of tearing down the existing facility and building a new theater is estimated to be between \$25 million and \$30 million, based on comparable school theaters that have been built in recent years in El Cerrito, Castro Valley, San Ramon and San Leandro."

The \$28 million El Cerrito facility is 56,061 SF and is not comparable to Alan Harvey at 17,424 SF.

(2) These comps were provided by famous Piedmont architect John Malick who also designed portions of the Head Royce and CPS high schools. Estimates includes Demolition (\$12/SF - \$17/SF), General Conditions (8.62%), Bonds & Insurance (1.5%), Overhead & Profit (5%), Design Contingency (4.08%), Soft Costs (30%). Silva Cost Consulting guarantees their estimate is within 5% of winning bid.

(3) Excluding program contingency buffer; Includes items in (2) in varying percentages

(4) Because it is a renovation, the Design Contingency is 15% (instead of 5% for new construction). Renovation program contingency covers surprise expenses (e.g. dry rot). Including \$1.9 million program contingency in construction costs for a more apples-apples comparison with tear-down & new construction.

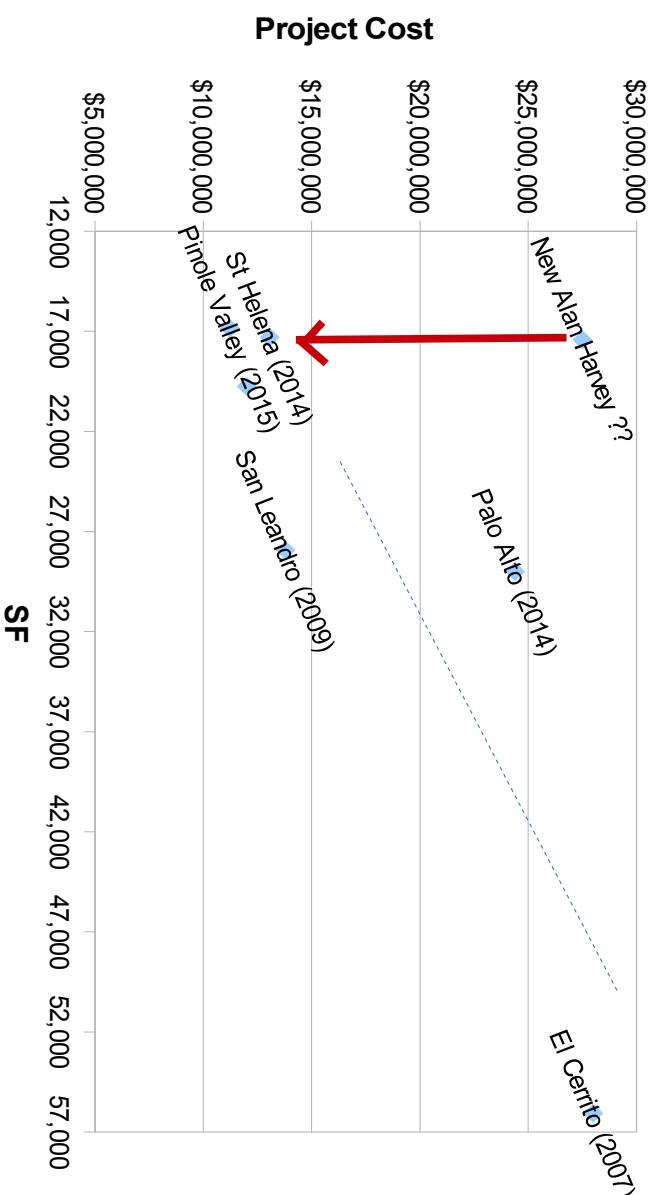
(5) If "Total Budget" then it includes the program contingency buffer. Excludes cost of relocating students (?) and construction cost escalation (5%)

(6) San Leandro's expenditure for the PAC building (theater + SLAM) was \$19,783,844 (COC report). Excluding \$6 million for SLAM.

These comps have SF similar to AHT

AHT Rebuild Comps

Set Storage	Balcony	Opt Sound	Green Room	Line-of-Sight optimized seating?	Description of additional rooms in building
Yes	Yes	Yes	Yes	Yes	classroom
Yes	No	Yes	Yes	Yes	drama classroom - that will double for the 'Green Room' for all performances - band room, scene shop, restrooms, box office
Yes	Yes	Yes	Yes	Yes	Library, administration, tech futures, community health clinic, band classroom, drama classroom, scene shop, parent room
Yes	Yes	Yes	Yes	Yes	Slam Academy Multi-Media Arts, Black box performing space, sound stage with control room + 2 classrooms
Yes	Yes	Yes	Yes	Yes	Theater office, work areas, drama classroom, tech rooms, concession, gallery
Yes	No	Yes	Yes	Yes	Ticket office, coat room, costume storage room, sound and light control booth
Yes	Yes	Yes	Yes	Yes	
Yes	Yes	Yes	Yes	Yes	
No	No	Partial	Yes	??	classroom



AHT Rebuild Comps

Project	Audio / Video	Extra Expense	Source / Online story	YouTube architects	Budget Becker	Silva Silva
Pinole Valley	Neutrik speakers					
St Helena	10-15 speakers with sub-woofers	Decorative ceiling, chandelier in main hall	YouTube architects			
El Cerrito	PA (L,R,C), 2 reverbs, 2 subwoofers...	Orchestra pit on a power lift	YouTube YouTuber			
San Leandro	PA (L,R,C), 2 reverbs, 2 subwoofers...		SanLeandroPAC Architects Website	Piedmont Post Update	COC Budget	East Bay E-Specs SLAM Press
Palo Alto						
St Francis	PA (L,R,C), 2 reverbs, 2 subwoofers...Orchestra pit on a power lift; catwalks	Construction Company Lawsuit				
New AHT	PA (L,R,C), 2 reverbs, 2 subwoofers... PA (L,R,C), 2 reverbs, 2 subwoofers... PA (L,R,C), 2 reverbs, 2 subwoofers...					
Reno – AHT	??	Elevator	PUSD website			

Questions?

Contact Hari Titan: [\(hstitan@yahoo.com\)](mailto:hstitan@yahoo.com)
(510) 450-0772



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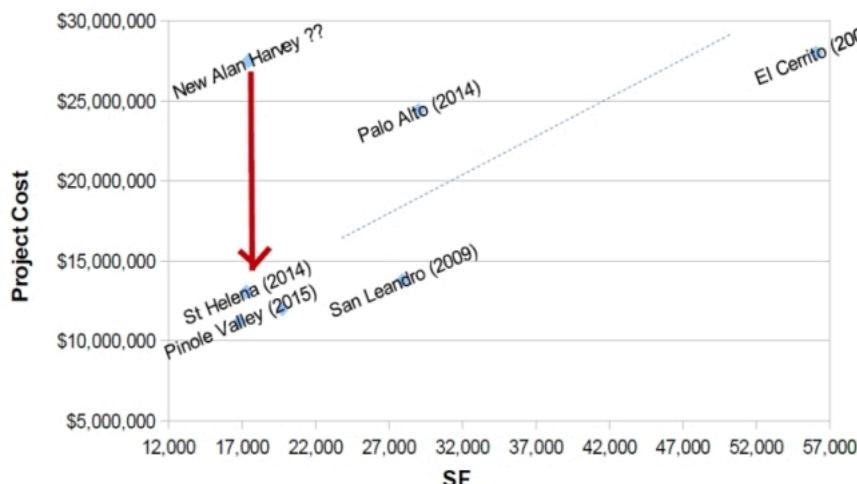
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Costing a Theater Rebuild

Submitted by [Hari Titan](#) on Sat, 04/05/2014 - 12:14am



The renovation option is budgeted at \$14.5 million, with \$13.5 million of that to be covered by a bond that voters are being asked to approve (Measure H).

The District estimated a tear-down and rebuild of the Alan Harvey Theater would cost between \$25 million and \$30 million.

Famous Piedmont architect John Malick found this new construction estimate to be extremely high and reached out to me and others.

John thought a new construction would cost less than the extensive renovation the District is seeking. John provided 3 comparable public high school theaters in the Bay Area to support his position and explained how sometimes major renovations can cost more than a rebuild.

Clearly if John's information is correct, why would anyone want to spend \$14.5 million to try to salvage the existing building?

Alicia knew me from my recent campaign and asked me to fact check John's position against the District cost estimate (above).

I spoke to John and a number of other architects from WLC, DLM, HMC and HY.

John went further to state that not only could we get a new theater for that price but we could get a state-of-the-art theater for the price of this proposed renovation.

This position was confirmed by WLC's experience designing and building state-of-the-art high school theaters / PACs.

Here are my observations about the District estimate for a tear-down and rebuild of AHT:

1. District materials (<http://www.piedmont.k12.ca.us/news/alan-harvey-theater>) show the new Alan Harvey Theater to be 17,424 square feet (SF).
2. The same webpage presents cost estimates for theater renovations with respect to price per SF of comparable projects in the Bay Area: Hillsdale HS Theater (\$669/SF), San Mateo HS Theater (\$547/SF) and St Francis HS Theater (\$546/SF).
3. However for estimating the cost for constructing a new theater, the same District webpage presents price estimates without division by SF:

Would it be more cost-effective to tear down AHT and build a new theater?

The cost of tearing down the existing facility and building a new theater is estimated to be between **\$25 million and \$30 million**, based on **comparable** school theaters that have been built in recent years in El Cerrito, Castro Valley, San Ramon and San Leandro.

[emphasis added]

4. Although the District page did not divide by the SF for the AHT (17,424), we can just as easily do that to transform the total cost range to a price/SF range. This division results in the District estimates the cost of building a new AHT theater is between \$1435/SF and \$1722/SF. This cost is unbelievably high.
5. However before we really do this division we should examine the "comparable school theaters" listed more closely. The first on this list is El Cerrito which is a 56,061 SF facility that was built for \$28 million. A 56,061 SF facility is hardly comparable to the 17,424 SF AHT.
6. The simplest way to "fix" the mistake of using El Cerrito's total price as a comp is to divide it by its SF and use the resulting \$499/SF as a comparable.
7. A problem with this approach is that the El Cerrito building has many more non-theater rooms than AHT will have. The cost/SF for non-theater rooms is much less than the cost/SF for a theater. This same problem is described on the District webpage as the problem of "comparing the cost of remodeling a kitchen with the cost of adding a bedroom."
8. Interestingly Pinole High School loved the El Cerrito theater so much that they decided to build an exact replica housed in a much smaller 16,846 SF building. The Pinole HS Theater is being built for \$10 million (\$594/SF) and is an excellent comp for the AHT.
9. The District also made a mistake with respect to the cost of demolishing and constructing the San Leandro HS Theater. According to an email sent to me by the architect of record for that project, the cost for that theater building was \$14,560,000 for a 27,931 SF building (\$521/SF). Again this 27,931 SF facility is not comparable to a new AHT. Clearly the District did not use \$14.56 million in its cost range and might have accidentally included the cost of other school buildings constructed for the same high school as part of the same project. The Piedmont Post did an article to confirm this pricing:

http://harititan.com/Renovation_v_new_construction.pdf

10. I noticed that when talking about the St Francis HS Theater, the District website refers to the job as a "construction" not a renovation. I checked with St Francis HS and indeed their new theater is a brand new construction which came in at \$546/SF. It appears this comp was miscategorized under the renovation section of the District website.
11. I could not get this type of info for San Ramon HS or Castro Valley HS theaters. Some ex-mayors signed a statement that a new theater would "cost double or triple" what this renovation would cost. I inquired and did not find any other comps that could support that.
12. I found many additional recently built HS theaters in or near the Bay Area. These are: Palo Alto HS Theater (\$696/SF), St. Helena HS Theater (\$694/SF), San Lorenzo HS Theater (\$629/SF) and Arcata HS Theater (\$512/SF), listed from most expensive down.
13. Combined with the other new theater comps presented earlier, this suggests it costs somewhere between \$446/SF and \$696/SF to build a new theater. The average cost is \$587/SF which is very close to the \$594/SF for Pinole HS.
14. If we use the recent average (\$587/SF), we'll get an estimate of \$10.2 million to build a new AHT. If we use the recent / historical maximum (\$696/SF), we'll get an estimate of \$12.1 million to build a new AHT. Using the average versus the maximum is almost analogous to using either Pinole or Palo Alto as comps. Which is more appropriate for Piedmont?
15. The cost/SF range that I got is nowhere near the cost/SF suggested by the District (see point #4 above) which is clearly wrong on the El Cerrito and San Leandro comps.
16. The historic maximum cost/SF for new theater construction is also lower than the AHT renovation price of \$832/SF. Clearly new construction is not only possible but more prudent than the current renovation plan.
17. Oddly the new construction price/SF range is similar to the renovation price/SF range described in point #2 above.
 - o The demolition cost is between \$12/SF and \$17/SF and is not a major factor
 - o New construction has the advantage of cheaper standardized materials and faster standardized construction sequence and methodology
 - o Renovations require a higher design contingency (15% versus 5%) compared to new construction due to unknown code violations that may be discovered
 - o Renovations also require a higher program contingency (e.g. 20%) to cover things like dry rot (e.g. discovered at Wildwood school)

- New construction allows stacking floors (e.g. classrooms below theater) which has a lower footprint and saves on roofing expense
- 18. A new construction with all new materials incl. a new foundation will last much longer.
- 19. A new theater would optimize acoustics with hard surface exterior walls and likely increase the seating capacity (with a balcony).

My "free" generalized cost estimate for a new rebuild of AHT is at: http://harititan.com/new_construction.pdf

Do click the links on Page 3 to confirm the specs and costs.

You can also see images of these comps in this presentation: <http://harititan.com/comps.pdf>

Haven's Elementary was originally supposed to be a renovation, not tear-down and new construction. Later Webcor explained it would be cheaper to tear it down and then rebuild: <http://www.construction-today.com/index.php/sections/institutional/567-w...>

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 **Hari Titan**
11 years ago

On Thursday April 3rd I sent Randy, Connie and Michael this information.

I also recommended the District use a company like "Silva Cost Consulting" which provides location specific estimates and guarantees their work.

I also asked the District for the building SF, theater SF and the total cost of construction for each of their "comparable" theaters at El Cerrito, San Leandro, San Ramon and Castro Valley.

If the District doesn't have these numbers I asked if the District would make an improved estimate based on addressing the issues I identified with their comps.

1 0 [Reply](#) 

 **Hari Titan**
11 years ago

Got an email from Javier Silva of Silva Cost Consulting today:

"Piedmont and Pinole are in the same geographic location, so there would be little to no cost difference, for an identical building. The only outstanding factor is the sitework. Site conditions can vary from project to project, soils, slope, site access, etc."

This email from a professional construction cost estimator helps defend the concept of using comparable building costs as a guide for a new construction project.

0 0 [Reply](#) 

 **Hari Titan**
11 years ago

Updated numbers based on discovering new links to other District websites. Sending out an email triggered help from Connie navigating two District websites and got indirect feedback from the "YES on H" campaign. Updated new_construction.pdf and comps.pdf.

0 0 [Reply](#) 

 **Hari Titan**
11 years ago edited

Randy told me that QKA and Vila Construction did the estimate for the new theater construction option:

<http://www.piedmont.k12.ca....>

Randy has no additional information from these companies to support why these 4 theaters were chosen to the exclusion of others, what their total costs were, how many square feet their building footprint is, what their theater footprint is, and why they are believed to be "comparable" with the Alan Harvey Theater.

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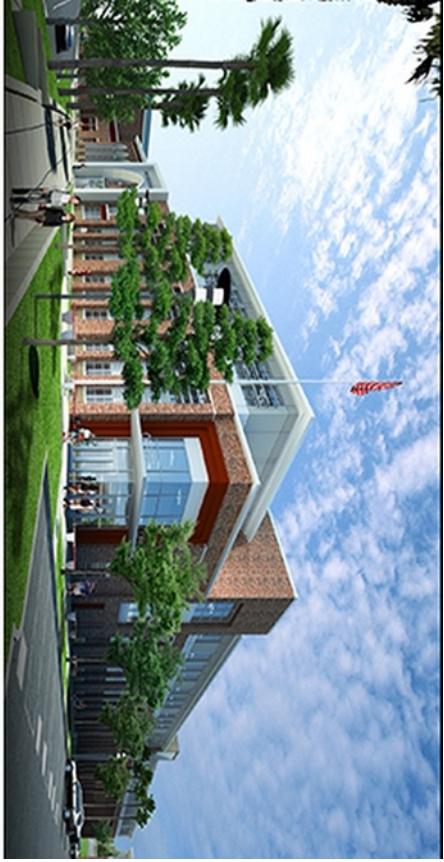
For further information or questions: [Email Hari](#)

[Parents for Educational Excellence in Piedmont \(PEEP\)](#)

2014-15 High School New Theater Rebuilds versus Alan Harvey

Pinole (600 seats): 16,846 SF @ \$666/SF

Renovation & expansion per Becker's design:
Alan Harvey (365 seats): 17,424 SF @ **\$832/SF**



St Helena (350 seats): 17,300 SF @ \$755/SF

Palo Alto (583 seats): 29,000 SF @ \$841/SF





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Creative Financing for School Renovations

Submitted by [Hari Titan](#) on Tue, 12/17/2013 - 7:36pm

Last week's School Board meeting confirmed that all attendees enthusiastically support renovation of the Alan Harvey Theater. Now, much like buying a home, financing becomes front and center. Do I get a 30-year mortgage? Can I afford 15-year mortgage payments? How about "interest-only"? Can I delay payments until 2018? Oh wait, that last option isn't really an option for mortgages but is for School Bonds.

The "no payments until" option charges interest on the unpaid interest, also known as compounding interest. These bonds are known in the industry as Capital Appreciation Bonds (CABs). Bond consultant KNN calls our CAB option a "Wrap-Around Bond" because the first payment in 2018 is set to match the payoff of an earlier bond, to try to keep total debt service tax rate for all school bonds level. These deferred payments result in a higher interest expenses totaling \$6.8 million.

One group of Piedmonters would definitely benefit from the CAB option ... those who move out of Piedmont before 2018! The rest of us will pay more in later years to buy the "Wrap-Around."

The two most vocal supporters of the CAB option on the Board (including a Financial Planner) cite possible advantages to the rest of us: 1) keeping total tax rates level; 2) forecasted inflation making future dollars "cheaper"; 3) paying down high-interest debt; and 4) the possibility of parlaying the deferred taxes into higher yielding investments.

The official rate on the CAB does not include the effect of compound interest. The CAB option charges the same total interest as a conventional 15-year Current Interest Bond (CIB) with a 7.97% interest rate. This suggests that if your investments yield more than this rate or your credit card debt is higher than this rate, it may make sense for you to support a CAB.

However this personal opportunity cost misses the opportunity cost to the School District. By paying an extra \$6.8 million in finance charges for the CAB option (thus affording some financial flexibility for a limited time), those funds cannot be used for other renovation projects we will need in the future. The School Board wants to hear from you on the structure of these debt servicing options.

Please email all the School Board members.

Please complete the survey here: <https://HariTitan.com/content/financing-options-alan-harvey-theater>

Tags:

- [CAB](#)

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Eliminate energy bills for school district

Submitted by [Hari Titan](#) on Mon, 12/09/2013 - 5:12pm

Reduce ongoing utility and other expenses for our schools.

For example, installing Energy Star certified HVAC, windows, and highest efficiency solar panels to generate electricity all result in reduced ongoing costs.

We are currently running a deficit and our reserves are dwindling. We could run out of reserves and start making cuts to educational programs or further cuts to support services.

The City of Piedmont has an ordinance that requires LEED certification, see Civic Green Building Ordinance:

<http://www.ci.piedmont.ca.us/climate.shtml>

<http://www.usgbc.org/projects/schools---new-construction>

If we use our capital expenditures to get LEED-certified renovations, we will be reducing our ongoing expenditures.

Pete Palmer (October 10, 2016): The district's electric bill is approximately \$350 to \$400k annually. Our goal, through conservation, high-efficiency mech units/boilers, improved bld envelope, and a district-wide solar master plan (which would include battery storage), to reduce our annual electrical bill to net zero.

Tags:

- [AHT](#)

2 Comments

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Bernard Pech

11 years ago

LEED is most likely to increase capital cost. Questions are: Does LEED truly results in a more environmental friendly building? Or does achieving a high LEED score lead to dumb trade-offs? We should not impose LEED expertise in the selection of the architect/contractor, but rather let them use good sense. LEED could easily derail the project. Piedmont includes several very good architects, such as John Malick, Rob Kelly, ... and contractors such as Andrioni, Andy Ball, ... They should be consulted as to the advisability of focusing the renovation around LEED.

1 0 Reply [🔗](#)



Hari Titan

4 years ago

The City of Piedmont links above are now broken.

East Bay Community Energy (EBCE) is now the default energy provider in Piedmont and they default to renewable energy. However my arguments for installing solar are to reduce or eliminate energy bills annually, thereby freeing up school district general funds for education related expenses.

The City of Piedmont has updated our Climate Action Plan to version 2.0, see here:

<https://piedmont.ca.gov/Use...>

Page 35 talks about: "Action BE-2.2F: Consider requiring Zero Net Energy (ZNE) construction for new construction."

This regulation would reduce the load on transmission lines and allow for new buildings to continue daytime operation during a blackout. I don't know if it got implemented.

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Full Day Kindergarten

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Submitted by [Hari Titan](#) on Mon, 12/09/2013 - 8:54pm

A lot of parents opt for private school based on a longer day Kindergarten.

Can we offer full day Kindergarten at Piedmont Schools?

The same classroom is shared by two kindergarten classes at Haven's Elementary.

It appears that additional classrooms might be required for the option of a longer day Kindergarten.

Spoke to Cheryl Wozniak about full-day Kindergarten. Turns out we are paying full-day salaries to all Kindergarten teachers even if they are teaching half day and sharing the same classroom.

Update (May 6, 2015): I forwarded my thoughts to PUSD about considering additional classrooms to facilitate Full Day Kindergarten. Getting lots of hits on this article (>600 unique IPs).

Update 2 (June 21, 2016): PUSD added Extended Day Kindergarten on the task list (with no priority) for Measure H1, see [here](#).

Update 3 (Sept 2016): Dropped a postcard in the mailer to all Piedmont residents. The postcard and my candidate statement makes a point that we should prioritize full day kindergarten if Measure H1 passes.

Update 4 (November 8, 2016): Measure H1 passes.

Update 5 (April 6, 2017 Email): A Message from Piedmont Unified School District

PUSD Elementary Families,

On March 22nd, the Piedmont Board of Education unanimously approved an Extended Day Kindergarten Program that begins in the fall of 2017. While extremely supportive, the Board voiced concern about the possibility of a bell schedule that may negatively impact before-school care opportunities for the community and staff (e.g. Schoolmates). The Board instructed District staff to revisit the bell schedule before coming to a final recommendation.

After collaborating with kindergarten teachers, site principals, and the Piedmont Recreation Department, the District is implementing the following bell schedule to help preserve before-school care across the District:

The recommended 17-18 schedule is a modified stagger schedule to meet the request of the Schoolmates Program. During our conversations with the Piedmont Recreation Department, it was clear that the City was hoping for at least a one-year stagger in order to give them time to redevelop their program.

2017-18

Modified Stagger Schedule:

For each kindergarten class the students would be divided into two Student Groups: A and B. Student Group A arrives at 8:30am on Monday and Tuesday and 9:10am on Thursday and Friday. All kindergarten students arrive at 8:30am on Wednesday.

Student Group B arrives at 9:10am on Monday and Tuesday and 8:30am on Thursday and Friday. All kindergarten students arrive at 8:30am on Wednesday.

In other words:

Student Group A

8:30am - 2:00pm Monday/Tuesday

8:30am - 1:45pm Wednesday

9:10am - 2:00pm Thursday/Friday

Student Group B

9:10am - 2:00pm Monday/Tuesday

8:30am - 1:45pm Wednesday

8:30am - 2:00pm Thursday/Friday

Like we do for 1st, 2nd, and 3rd grade classes annually, during the first few weeks of school, all kindergarten students will be on a daily 8:30am-2:00pm schedule in order for the kindergarten teachers to appropriately evaluate and assess all students. This typically lasts until the labor day weekend. When students return on Tuesday, September 5th, they will be in their stagger groupings and the schedule will shift to what is listed above.

The 18-19 school year will revert to an 8:30am-2:00pm schedule (Monday, Tuesday, Thursday, Friday), as teachers stress that this schedule is the most educationally appropriate for kindergarten students.

2018-19

8:30am - 2:00pm Monday/Tuesday/Thursday/Friday

8:30am - 1:45pm Wednesday

I want to thank the community for their patience as we worked in partnership with the teachers and Piedmont Recreation Department to develop a schedule that both addressed the educational needs and the community needs for before-school care. I am thrilled at the opportunity for an Extended Day Kindergarten program for our students!

Also, the District is hosting its annual Kindergarten/Transitional Kindergarten Information Night for families on April 20th, 7:00-8:30 pm in the Wildwood Elementary School Auditorium. All are invited!

Sincerely,

Randall Booker, Superintendent - Piedmont Unified School District

Michael Corritone, Principal - Beach Elementary School

Carol Cramer, Principal - Wildwood Elementary School

Anne Dolid, Principal - Havens Elementary School

Tags:

- [kindergarten](#)



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Renovation Survey Results

Submitted by [Hari Titan](#) on Thu, 06/26/2014 - 9:54pm

Disclaimer

This is an ad-hoc survey based on 54 survey respondents and 32 spousal responses. This is a low number, especially when looking at distributions of answers by the way they voted.

All but 3 of these respondents chose to remain anonymous.

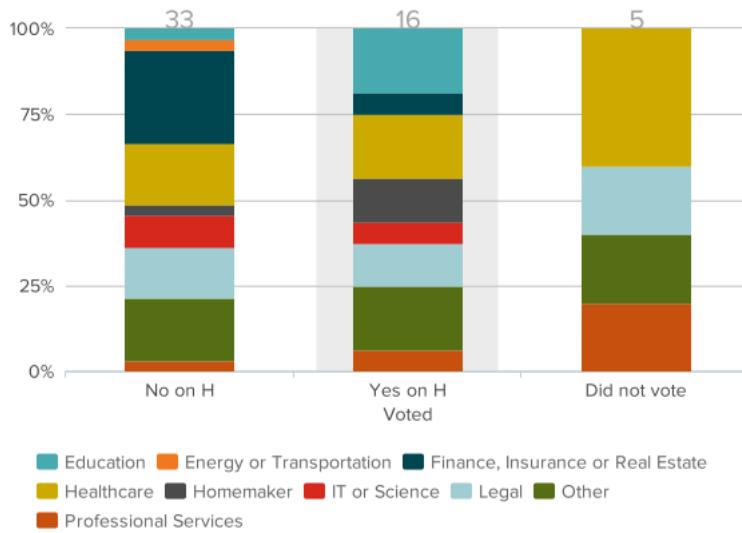
I only focus on significant or dramatic survey response differences that also validate with other survey questions.

Nevertheless this set of respondents is biased in favor of those who took the time to fill out a survey on my website and should be taken with a large "grain of salt".

Industry

It seems a lot more Finance and Real Estate people voted "NO on H" and perhaps understood the "comparable theater" costs and price/SF big picture better. Homemakers and Educators tended to vote "YES on H".

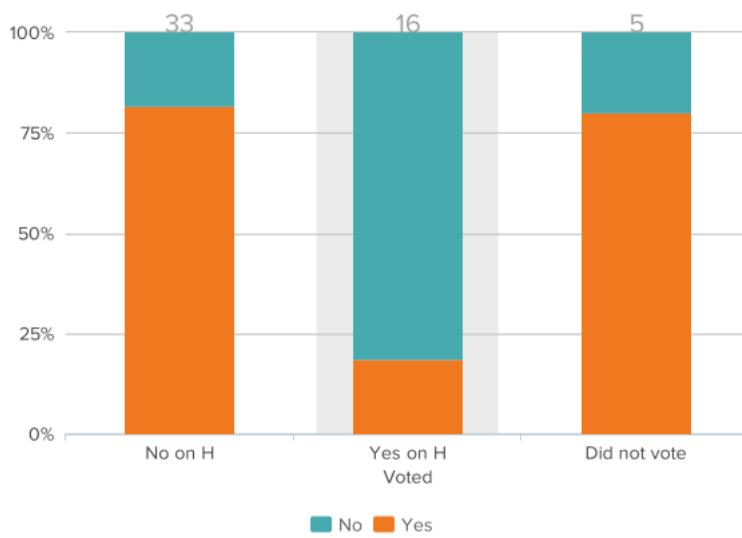
Industrial Complex



Project Cost too high?

These results match anecdotal remarks made by "NO on H" voters.

Project Cost was too high?



Overpriced?

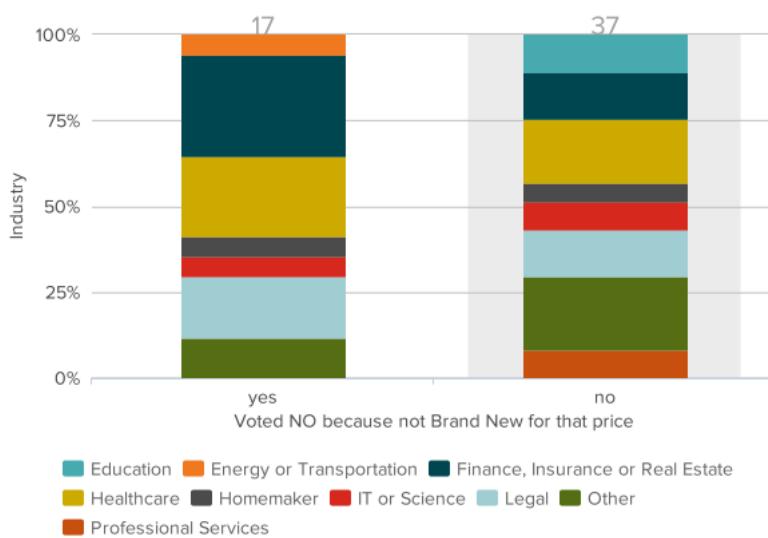
I read through the reasons for the "NO on H" voters to see if they wanted a ***brand new*** theater building.

I ignored folks that wanted a brand new theater for a greater price tag. The set of "NO on H" voters that felt we could get a new building for the same price or less was approximately 50% (18/33).

I broke out these voters out by Industry (when available).

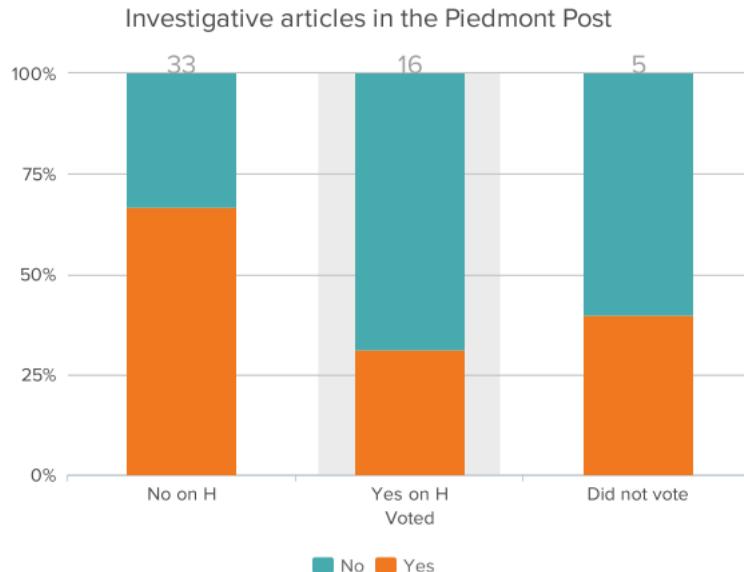
The Finance, Insurance and Real Estate (F.I.R.E.) respondents were twice as likely to agree "we could get a brand new theater for that price." Lawyers and legal professionals were also more likely to agree with that statement. The few educators who responded, exclusively voted "YES on H".

Overpriced



Piedmont Post Investigations

Investigative articles by Kate Fratar had a strong influence in the minds of over 50% of the "NO on H" voters. Some 30% of "YES on H" voters were influenced by those articles in favor of voting "YES on H".

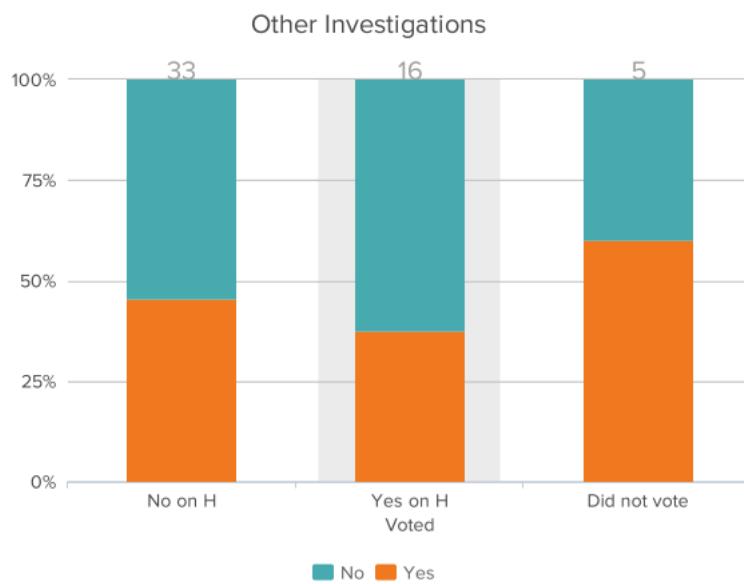


Other investigations

Of course many of the voters coming to my website to fill out the survey are going to have seen my rebuild cost analysis and the cost of going back to the drawing board.

My analysis could be used by "NO on H" voters to argue our kids deserve a better deal than this and also could be used by "YES on H" voters to argue with the designers and School Board to change their direction towards a new building option.

This chart shows how my analysis was used by a minority both sets of voters.

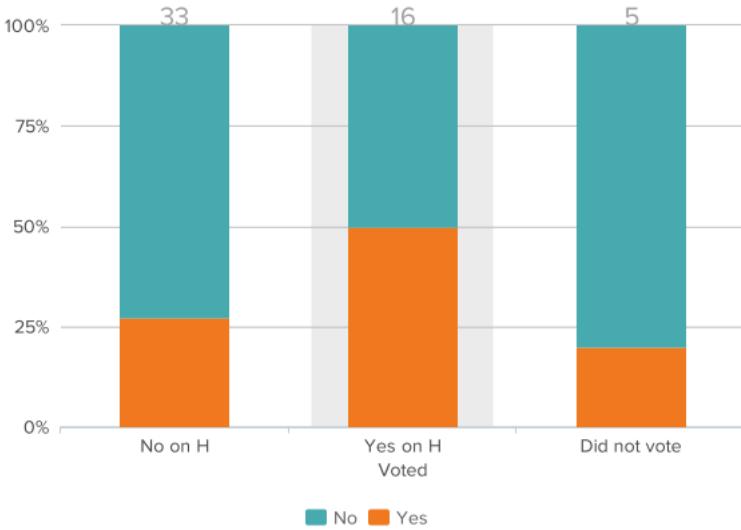


District FAQ

Clearly the "YES on H" voters liked the information provided by the District including their FAQ. However only 50% of them actually read those documents!

Something like 25% of the "NO on H" voters read the District documents and found them severely lacking enough to justify a NO vote.

Influenced by District FAQ



Other Observations

Post-grads were more likely to vote "NO on H" than those who graduated college.

People "very involved" in schools were twice as likely to support the renovation.

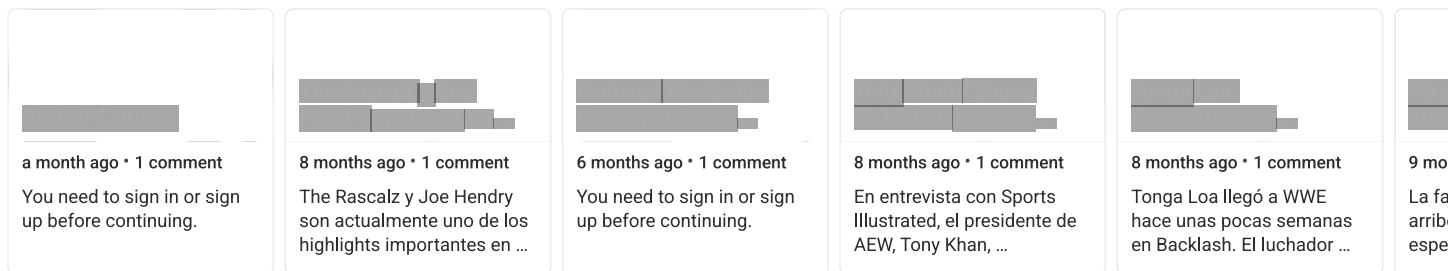
Women were 50% more likely to vote "YES on H".

Endorsements from School Board members or City Council members had no effect on "NO on H" voters and only influenced 35% of "YES on H" voters. Endorsements from friends and family had a bigger impact (as to be expected).

Tags:

- [AHT](#)

ALSO ON NULL



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[Email this page](#)

For further information or questions: [Email Hari](#)

[Parents for Educational Excellence in Piedmont \(PEEP\)](#)

Re: Thanks for getting back to me

From: Sarah Pearson (srpear@gmail.com)
To: hstitan@yahoo.com
Date: Friday, October 3, 2014 at 05:41 AM PDT

Hello Hari -

Thanks for taking the time and for sending this. sorry not to respond sooner but I haven't yet had a chance to watch the 35 minute interview. Interesting that they also opted for fewer seats, as opting for a smaller theater had definitely been one of the highly criticized features of AHT.

I will try to listen to the whole interview early next week but if you could summarize main points that would probably be most helpful before sending to other board members.

We invited the public to comment on thoughts and ideas in regard to AHT at our last meeting, and will do so again at some point in the future.

Sarah

On Oct 1, 2014, at 11:47 PM, "Titan, Hari" <hstitan@yahoo.com> wrote:

Hi Sarah,

I wanted to chat a bit about the future of the AHT project. I wanted to know if the board would now consider a reconstruction/rebuild option.

Over the summer I visited HY Architects and took video of my interviewing the architect who designed St Helena's new high school theater (still under construction).

The video is on my website: <http://harititan.com/hy-architects.mp4>

My camera work is rather atrocious, mainly because I was interviewing while recording.

Do you think other board members would care for this video?

Let me know and I'll drop a line to the entire board.

Hari



[Digital Town Hall](#)

for the PUSD Board of Education

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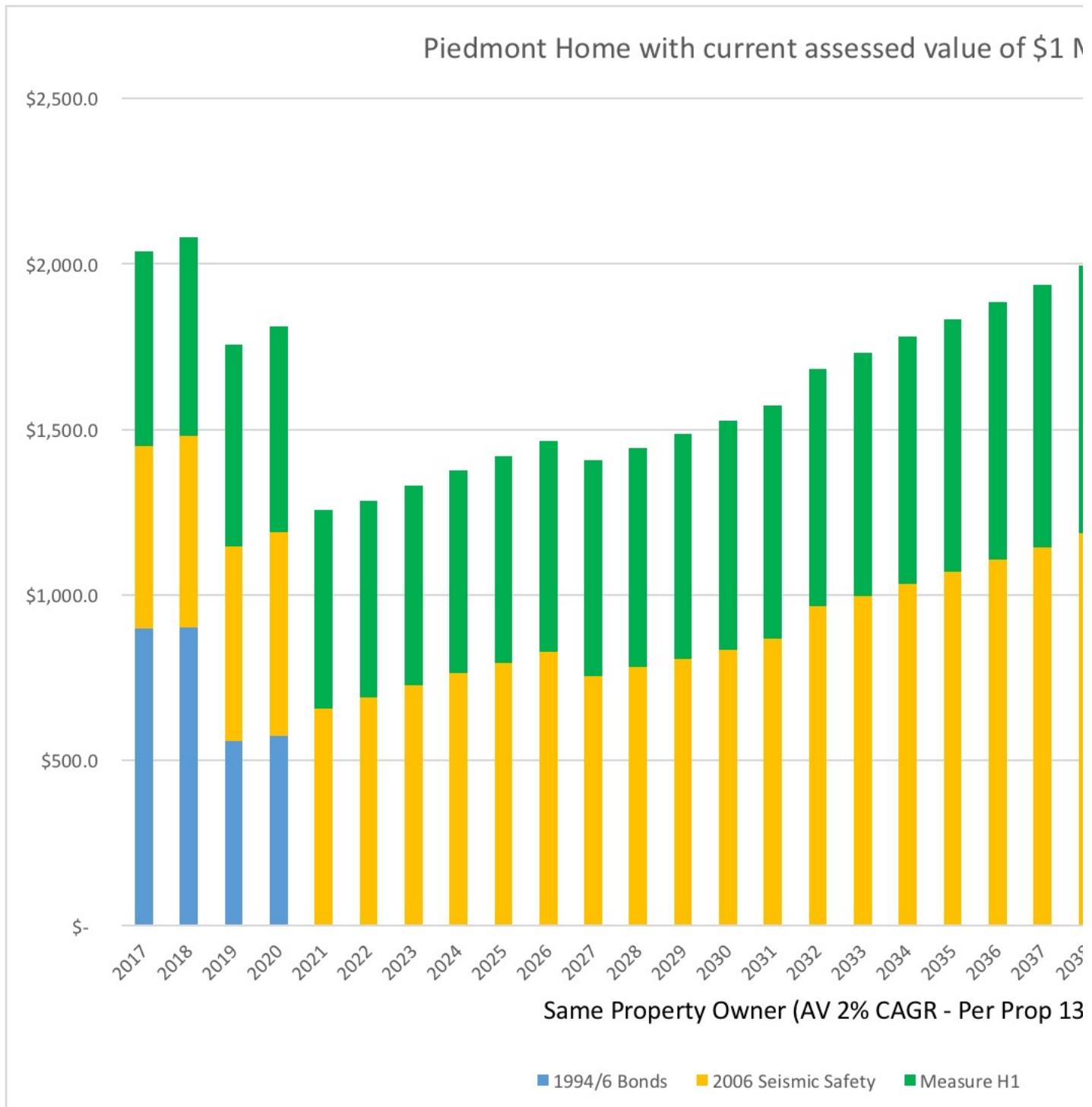
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Measure H1 is Affordable

Submitted by [Hari Titan](#) on Mon, 10/03/2016 - 9:50pm



The passage of Measure H1 is expected to trigger three bond issuances staggered 2 years apart in February of 2017, 2019 and 2021. In order to be able to pass Measure H1 with only 55% of the vote, the law requires that the combined tax impact of these bonds be less than \$60 per \$100,000 county assessed valuation (AV) subject to AV growth assumptions. The district is assuming overall assessed valuations are growing at 3.5% annually but if you are a current owner, Prop 13 will limit the growth of your assessed value to 2% per year. This AV growth rate compounds annually.

This year's AV for the entire district is around \$4 Billion. By 2047 when all three bonds are paid off, the district AV is expected to be \$11.4 Billion. With roughly 4000 homes, the average AV is currently roughly \$1 million. If we take a property that has an AV of \$1 million today and apply Prop 13's 2% annual growth rate, it will end up with an assessed value of \$1.8 million by 2047. That home will start out paying \$587 for Measure H1 in 2017 and this amount will increase to \$929 in 2047 based on the higher \$1.8 million AV. The total tax for this home would be \$22,805 over the 31-year repayment period (2017 through 2047).

That's \$2.02 / day (if your current county assessed value is \$1 million)!!!

If we look at all debt service of prior bonds combined with Measure H1 (see Chart above), the new tax burden will be higher for years 2017 through 2020 but then will become even lower than what property owners are paying now until 2026.

All these numbers are scalable with your own county assessed valuation. For example if your AV is \$700k, just multiply above numbers by 70%. If your AV is \$1.3 million, multiply the above numbers by 1.3 or 130% etc.

More importantly, the chart above is scalable and has the same shape for every homeowner. The annual tax (Y-axis) will vary based on your current county assessed value (see property tax bill).

This analysis is subject to the following assumptions that can and will likely change over time:

- Homeowner doesn't sell or substantially improve their property
- Actual assessed value increases in the future
- Board issues bonds for the whole authorization of \$66 million
- The market interest rates at the time of the bond issuances
- Potential refunding of the series in the future

Theater seats with built-in writing tables reusable as overflow classroom seats

From: Titan, Hari (hstitan@yahoo.com)
To: rbooker@piedmont.k12.ca.us; ppalmer@piedmont.k12.ca.us
Date: Friday, May 15, 2020 at 01:43 PM PDT

Hi Randy,

I read your letter from the Facilities Steering Committee and it seems the school board made the right decision to proceed with the construction of the new Performing Arts Theater. The sooner the work begins the better.

I think your challenge now is how to accommodate social distancing requirements that might be coming down the road.

Have you calculated enough socially distanced spacing for the high schools and middle schools?

Many university campuses have stadium-style classroom seating with chairs having a side table that swings out in front. That table can accommodate a writing pad or Chromebook.

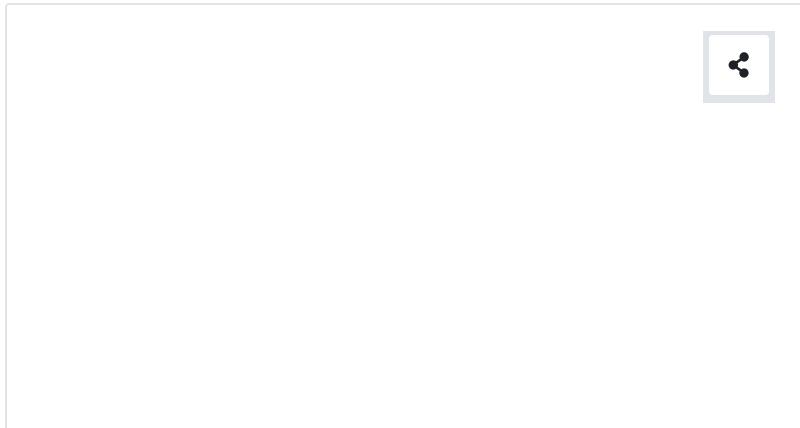
Here is a sample photo of what I'm referring to:



I got this image from this webpage which has a video of how this side table opens up: https://www.alibaba.com/product-detail/Modern-stadium-chair-folding-auditorium-seat_60746371482.html

Alibaba also has a vast collection of theater seating and many of those seats have this side writing table option of varying sizes:

[Theater Furniture, Commercial Furniture suppliers and manufacturers - Alibaba](#)





Theater Furniture, Commercial Furniture suppliers and manufacturers - Al...

Theater Furniture, Find Quality Theater Furniture Products, suppliers, exporters, manufacturers at Alibaba.com.

If you haven't locked down the make and model of the new PAC seating you may wish to consider the option of built-in writing tables.

BTW, sorry to hear about the lack of state funding and the need to cut back on solar panels.

Let me know what you think of this idea.

Thanks for your time and dedication to what's best for students and the district finances.

Sincerely,

Hari Titan

Re: Extended Day Kindergarten

From: Alicia Gruber (gruberad@gmail.com)

To: hstitan@yahoo.com

Date: Friday, April 7, 2017 at 09:30 AM PDT

Congratulations Hari!!!!!!

Strong work.

You should be very proud of this accomplishment.

a

On Thu, Apr 6, 2017 at 6:18 PM, Hari Titan <hstitan@yahoo.com> wrote:

FYI.

Credit goes to you both for supporting the candidate supporting this idea and driving traffic to my website.

No Ed Foundation or associated parents club or other candidate encouraged this idea.

This does not increase our district expenditures.

It's also entirely optional to participate in the extended hours if parents don't want to.

Hari

----- Forwarded message -----
From: no-replies@piedmont.k12.ca.us
Date: Apr 6, 2017 3:09 PM
Subject: Extended Day Kindergarten
To: hstitan@yahoo.com
CC:

A Message from Piedmont Unified School District

PUSD Elementary Families,

On March 22nd, the Piedmont Board of Education unanimously approved an Extended Day Kindergarten Program that begins in the fall of 2017. While extremely supportive, the Board voiced concern about the possibility of a bell schedule that may negatively impact before-school care opportunities for the community and staff (e.g. Schoolmates). The Board instructed District staff to revisit the bell schedule before coming to a final recommendation.

After collaborating with kindergarten teachers, site principals, and the Piedmont Recreation Department, the District is implementing the following bell schedule to help preserve before-school care across the District:

The recommended 17-18 schedule is a modified stagger schedule to meet the request of the Schoolmates Program. During our conversations with the Piedmont Recreation Department, it was clear that the City was hoping for at least a one-year stagger in order to give them time to redevelop their program.

Office of Public School Construction[View All](#) —**SERVICES**HOME OFFICE OF PUBLIC SCHOOL CONSTRUCTION SERVICES ACCESS FULL-DAY
KINDERGARTEN FACILITIES GRANT PROGRAM FUNDING

Access California Preschool, Transitional Kindergarten and **Full-Day** Kindergarten Facilities Grant Program Funding

The Full-Day Kindergarten Facilities Grant Program has been expanded to include California Preschool, Transitional Kindergarten and Full-Day Kindergarten. School districts that lack the facilities to provide preschool, transitional kindergarten, and/or full-day kindergarten instruction can locate funding opportunities under this service.

About this Service

School districts can apply for this service to construct new classrooms or retrofit existing school facilities for the purpose of providing transitional kindergarten or full-day kindergarten instruction. Additionally, both school districts and county offices of education can apply for this service to construct new classrooms or retrofit existing school facilities for the purpose of providing California preschool instruction.

The Program was established by Assembly Bill 1808, the Education Finance: Education Omnibus Trailer Bill, and was approved by the Governor and chaptered **June 27, 2018**. The General Fund appropriated \$100,000,000 in one-time grants for the construction of new classrooms or the retrofit of existing facilities for the purpose of providing full-day kindergarten instruction. These funds were apportioned for applications received during the First Filing Round, January 2, 2019 – January 31, 2019, and the Second Filing Round, May 1, 2019 – May 30, 2019.

The Program was expanded by Assembly Bill 130, the Education Finance: Education Omnibus Trailer Bill, and was approved by the Governor and chaptered July 9, 2021. The expanded program includes the addition of

California Preschool and Transitional Kindergarten funding eligibility. The General Fund appropriated \$490,000,000 in one-time grants for the construction of new classrooms or the retrofit of existing facilities for the purpose of providing California preschool, transitional kindergarten or full-day kindergarten instruction.

Following a series of stakeholder meetings to discuss and solicit feedback in the preparation of program regulations. OPSC presented, and the State Allocation Board (SAB) approved, the proposed regulatory amendments, revised forms and updated Grant Agreement at its January 26, 2022 SAB meeting.

The Program is amended under Assembly Bill 181, effective June 30, 2022, and allocated an additional \$100 million to the Program. Subject to Legislature appropriation, an additional \$550 million is intended to be allocated to the Program in the 2024/25 fiscal year.

As part of the approval, two funding rounds for the new program were announced as follows:

April 1, 2022 – April 30, 2022

February 1, 2023 – March 2, 2023

Full details from the SAB approved item are available in the January 26, 2022 SAB meeting agenda found under the meetings tab.

Compound Interest = Non-productive Debt =
Deferred Repayment = Deferred 'Debt Service'
Property Taxes

Bond Financing Options Explained to Parents and Taxpayers

by Hari Titan, Candidate for PUSD School Board 2014

Since 2000, our school district has identified a number of buildings needing renovation, for seismic safety and/or for modernization. In 2006 Piedmont voters approved a massive bond program to pay for seismic safety improvements (information is available at <http://pusdbond.org>). That program is now complete, but the School Board still has a long list of modernization measures it would like to complete.

The School Board is currently looking at another ballot measure next year, seeking voter approval to issue additional bonds to finance the renovation of the Alan Harvey Theater at Piedmont High School. The Board seems close to settling on a budget of \$14.5 million, but has not settled on the types of bonds – its choice will make significant differences in how much Piedmont homeowners pay, and when. I do my best to explain these differences below.

Creative financing options have been put forward by bond industry with the stated purpose to help pass the bond measure with taxpayers.

These options would allow the School Board to eliminate tax increases until after older bonds mature in 2018 and 2020... but with higher long-term costs to homeowners.

In one of these options, the **Capital Appreciation Bond (CAB)**, no taxes are collected and no payments are made to bond holders for a number of years. Interest charges accumulate and are added to the principal borrowed which becomes a problem for taxpayers in the future.

Delaying tax payments hides higher taxes in the future due to compounded accrued interest payments. This increases the principal amount owed, described as "capital appreciation".

CABs share this trait of "negative amortization" with balloon mortgages and reverse mortgages.

Total taxes paid during the life of the bond eventually have to recapture the costs of the tax/payment holiday and compound interest effects. One way to think about this is called the "repayment ratio", which describes how many dollars are eventually repaid for every dollar of the bond amount.

From the repayment ratios suggested, a CAB bond cost between 3 to 4 times as much as a **traditional Current Interest bond (CIB)**.

The bond industry assumes (on faith) that the tax holiday of a CAB will be easier to sell to current taxpayers than a traditional Current Interest bond.

In Aug 2013, the School Board issued a CAB with no payments (and therefore no tax collection) for 14 years (until 2027) without consent of the majority of taxpayers.

Why should taxpayers in 14 years be liable for our expensive our CABs? California State Bill [AB 182 explains](#) that School Districts feel property valuations would be higher many years into the future and that higher taxes will become legal under Prop 39.

CABs have come under heavy taxpayer revolt which resulted in new legislation to require their disclosure to the public (effective 2014) in a ballot measure.

However the mere disclosure of CABs does not inform the public about its financial consequences. PUSD board members referred to AB 182's new legal maximum repayment ratio of 4 as a reason for the public to no longer be alarmed. The table below demonstrates whether a repayment multiplier of 4 looks like a good deal compared to a traditional Current Interest Bond (CIB).

Sum of Assessed Property Values (AV) for Piedmont 2013/14: **\$3,382,469,394**

The new Bond Amount we are seeking is: **\$14,500,000**

	<u>Bond Type</u>		
	<u>Current Interest</u>	<u>Capital Appreciation</u>	
Yield (%) [level debt-service; level principal]	3.40%	7.00%	
Yield Premium for the privilege of deferred payments	---	3.60%	
Duration of Bond (years)	25	25	
First year of taxation	1	15	
<i>District Total Tax Collected for duration of bond</i>			
Repayment Ratio (Total Tax / Bond Amount)	1.5	4	
Total Tax	\$21,750,000	\$58,000,000	
Bond holder Interest Portion of these Taxes	\$7,250,000	\$43,500,000	
Comparable Interest Rate (%)	3.40%	15.53%	
<i>Total Tax by assessed home value over life of bond</i>			
Per \$100,000 assessed value	\$643.02	\$1,714.72	
Person A: \$500,000 assessed home value	\$3,215.11	\$8,573.62	
Person B: \$1,500,000 assessed home value	\$9,645.32	\$25,720.85	
Tax liability for Person B - tax liability for Person A	\$6,430.21	\$17,147.24	
For average assessed value	\$5,282.21	\$14,085.89	
<i>Average Annual Bond tax</i>	<i>All years</i>	<i>Years 1-14</i>	<i>Years 15-25</i>
Per \$100,000 assessed value	\$25.72	\$0.00	\$155.88
Person A: \$500,000 assessed home value	\$128.60	\$0.00	\$779.42
Person B: \$1,500,000 assessed home value	\$385.81	\$0.00	\$2,338.26
For average assessed value	\$211.29	\$0.00	\$1,280.54

[The yellow areas are inputs for the calculations]

If we look at Total taxes (in green), traditional Current Interest bonds are way more appealing. If we are against any noticeable "tax increase" (in blue), then CABs are the winner.

The public should be given this explanation and choice.

Go to <http://HariTitan.com/bond-tax-comparison.htm> for an online version of this table that allows you to enter your home valuation and customize the effect to your tax liability.

Person B is paying more tax than Person A for either bond type. However this differential magnifies for CABs (see red). Folks who moved to Piedmont recently, bought near the 2006

peak or bought bigger homes would be more harmed by a CAB than a CIB in the long run.

The Board used a report from KNN (a “bond expert” and bank subsidiary) that did not try to inform these consequences to taxpayers.

The public needs to be fully informed along the lines of my table of pros and cons.

This function should not be outsourced to “bond experts” or the bond industry.

Fitch Ratings state that CABs harm tax rate capacity to meet subsequent needs for capital expenditures:

“The higher yield, coupled with the longer repayment period, results in higher total debt costs for every dollar generated for projects compared to current interest bonds. As a result of these drawbacks, some issuers may find their tax rate capacity insufficient to meet subsequent capital demands.”

San Mateo County (along with 2 other California counties) formed a Grand Jury to investigate CABs. One of their findings was:

“Moreover, CABs create a disconnect between when borrowed money is spent and when (and by whom) it is paid back. The taxpayers who approve these loans are presenting the tab to their children and grandchildren.”

The same report quotes California State Treasurer Bill Lockyer as stating:

“The only people these deals benefit are the financial advisers, who have collected millions of dollars helping school districts sell capital appreciation bonds.”

The California Association of County Treasurers and Tax Collectors has called for an outright ban on contributions by brokers, dealers and MUNI professionals to bond ballot measures. I would add this ban should also apply to funding for School Board elections.

California Governor Jerry Brown questioned the legality of “cash-out” nature of these bonds and the reporter suggests the property value increase assumptions are wild:

“Moreover, the property taxes that will be needed to pay off the debt is based on wild assumptions that property values will increase exponentially.”

This situation underlines the need for a School Board member who can craft accessible and comprehensive presentations and can help design and facilitate an electronic Town Hall that can reach greater numbers of engaged citizens on all subjects including matters of financial importance.

Hari Titan for the P.U.S.D. School Board 2014
Modernize access and decision making with an electronic Town Hall

Web: <http://HariTitan.com>

financial perspective on CABs

From: Titan, Hari (hstitan@yahoo.com)
To: corysmegal@gmail.com
Date: Sunday, October 14, 2018 at 08:40 PM PDT

Hi Cory,

I was the first to mention publically any problem with CABs at the school board meetings.

Like I stated earlier today the board was enamored with present value calculations that falsely made CABs look good.

I then published this article in the Post and online in Feb 2014:

[In Defense of Total Repayments | Community Electronic Town Hall](#)

In Defense of Total Repayments | Community Electronic Town Hall



As per my previous email this financial perspective was able to change a few minds on the board enough to get them to add the statement about CABs for Measures H and H1 and to start off the financing using CIBs.

I also followed with the first mention of an early redemption (refinance) on record:

[Early Redemption | Community Electronic Town Hall](#)

Early Redemption | Community Electronic Town Hall



It was published in June 2014 and mentioned a face value of the new bond to be approximately \$25 million. It also talks about needing more bonding capacity.

I later talked about how we could have done a CIB in 2013 in the first place to save additional taxes. I used the example of taking some of those savings to get a theater for free.

[A New Theater for Free | Community Electronic Town Hall](#)

A New Theater for Free | Community Electronic Town Hall



This was published in Oct 2014 after the summer failure of Measure H and was not a contributory factor in Measure H's failure.

I ran a survey on the reasons for the failure of Measure H and the reasons provided were too much money for one program or bad design or could get a new theater for almost the same price.

Hope this helps you see that I was fighting an uphill battle against CABs with little support on the board.

Hari

Fw: Tax Rate Statement excluding CABs... Thank you

From: Titan, Hari (hstitan@yahoo.com)
To: corysmegal@gmail.com
Date: Sunday, October 14, 2018 at 08:20 PM PDT

Hi Cory,

Here is another one relating to the expression attached to Measure H and later H1...

"The District does not anticipate using bonds that will compound in interest (Capital Appreciation Bonds)."

Hari

----- Forwarded Message -----

From: Teddy Gray King <teddygrayking@gmail.com>
To: "hstitan@yahoo.com" <hstitan@yahoo.com>
Sent: Thursday, April 10, 2014, 12:09:28 PM PDT
Subject: Re: Fw: Tax Rate Statement excluding CABs... Thank you

Thank you, Hari, for forwarding this information to me. I applaud your involvement with the school board and I appreciate your professionalism.

Best to you and I hope to see you soon,

Teddy

On Wed, Apr 9, 2014 at 4:36 PM, Titan, Hari <hstitan@yahoo.com> wrote:

Dear future Mayors of Piedmont,

In the email below I congratulated the School Board for adding a single sentence in the tax rate statement for Measure H per my request.

I asked Connie/Rick to choose the language and I am not worried about the wiggle room ("does not anticipate") in the actual language you see there.

I believe the School Board complied with my request as a result of my campaign drawing attention to creative financing. (Many board members miss the selling points of a CAB and two members are very angry about my drawing attention to the negatives of CABs.)

This is a historic step and adds to the transparency for the ballot measure and also enhances the idea of getting full consent of the governed. I have not seen other cities do it this way.

I like celebrating small victories.

Hurray for Piedmont!

Thanks for your support.

Hari

----- Forwarded Message -----

From: "Titan, Hari" <hstitan@yahoo.com>
To: Connie Hubbard <chubbard@piedmont.k12.ca.us>; Rick Raushenbush <rraushenbush@piedmont.k12.ca.us>
Cc: Michael Brady <mbrady@piedmont.k12.ca.us>; Randal Booker <rbooker@piedmont.k12.ca.us>; Sarah Pearson <spearson@piedmont.k12.ca.us>; Amal Smith <asmith@piedmont.k12.ca.us>; Doug Ireland <dirireland@piedmont.k12.ca.us>; Andrea Swenson <aswenson@piedmont.k12.ca.us>
Sent: Sunday, March 16, 2014 11:03 AM
Subject: Tax Rate Statement excluding CABs... Thank you

Dear Connie,

I recently noticed the tax rate statement for Measure H and was pleased to see the following:

"The District does not anticipate using bonds that will compound in interest (Capital Appreciation Bonds)."

<http://www.acgov.org/rov/elections/20140603/documents/MeasureH.pdf> [page 2, last paragraph]

I believe this statement will increase the chance of the measure passing.

At the School Board meeting in January 22 when I proposed this amendment, Mr. Wadhwani presented a discount rate analysis that I felt played "fast and loose" with the mathematics and it's application to taxpayer bond debt service.

I reached out to better recognized individuals in our community to help me clarify why.

Dr. Elwyn Berlekamp came forward to help with an article he submitted to the Piedmont Post. In case you missed that article, it appears in his email below.

Elwyn's credentials can be summarized as follows:

Berlekamp received his PhD from MIT in 1964 and became Professor of Electrical Engineering, Computer Science, and Mathematics at UC Berkeley. Berlekamp also managed an algorithmic bond trading fund known as Medallion. Under him, the fund's one-year return to investors in 1990 was 55%. He then sold the company to Renaissance Technologies. According to the Wall Street Journal, this fund continued to provide the highest returns of any hedge fund until 2005, with George Soros' Quantum Fund coming in second.

Hopefully this helps support my stance that the majority of voters who wrote in to the School Board on bond financing had the right gut instinct on the way in which CABs work.

Hari

----- Forwarded Message -----

From: Elwyn Berlekamp <berlek@gmail.com>
To: Bernard Pech <bj.pech@gmail.com>
Cc: "Titan, Hari" <hstitan@yahoo.com>
Sent: Sunday, February 9, 2014 9:55 AM
Subject: Re: In Defense of Total Repayments

Here's my newest proposed revision:

In Defense of Total Repayments

The School Board has taken to the idea that taxes can be deferred and reinvested to earn a safe return high enough to significantly discount the cost of additional interest charges. This safe return has been chosen to be between 3% and 4% based on a mix of long term Treasuries. The School Board has asserted that as a result of this "discount rate", all financing options including CIBs, interest-only hybrids and CABs cost very close to the same amount! We question this assertion on a number of grounds.

The application of a discount rate assumes the taxpayer already has something equivalent to these financial instruments or plans to get them in their brokerage account when the School Board decides on a financing scheme that defers taxes. Most taxpayers will find this a hassle to do. Piedmont issued a CAB in August 2013 (Series E) but taxpayers were not informed that the discount rate assumptions required reinvestment.

Also for an individual taxpayer the amount deferred is so low (\$100 - \$200 per tax bill, for the typical appraised value in Piedmont) that transaction fees getting in and out of these safe investments will eat into their returns. This taxpayer would need to make 2 transactions per year, investing the "savings" every time they pay their lower property taxes, slowly building up their investment until it is time to start cashing out and paying the deferred taxes. All this effort by the taxpayer is in stark contrast to the simplicity of the investors who lent money to the District in the first place (e.g. buying the Series E bonds). Those lenders did one transaction and got a virtually guaranteed (AA-) safe return that compounds automatically.

For most taxpayers, deferred taxes will realistically end up in higher risk investments like the stock market, or in near zero return savings accounts, or end up spending on consumer goods, travel etc. (which is effectively a 100% loss from a reinvestment POV). Reporting the

total repayment costs and repayment multipliers inherently assumes a zero discount rate on unpaid taxes with no assumption on reinvestment.

Comparing repayment multipliers correctly shows the investment challenge posed to those taxpayers who do want to reinvest deferred taxes. Applying a discount rate analysis for the whole community makes unrealistic assumptions of how taxpayers will behave in the future.

Fw: Jan 22, 2014 explanation of NPV and discount rates regarding CABs

From: Titan, Hari (hstitan@yahoo.com)
To: corysmegal@gmail.com
Date: Sunday, October 14, 2018 at 08:03 PM PDT

Hi Cory,

The email below has a link to what the previous school board was thinking when it came to CABs.

Since Song was new to this topic, I pointed her to the video of the school board meeting on January 22, 2014 and paraphrased some of the things talked about.

It was clear to me back then that the majority of that board believed that the present value calculation applied to average taxpayers. I feel this was misreported by KNN Public Finance and that the present value actually applies from the bond investor's POV.

My financial perspective has been and still is that the bond investor's POV is different from the taxpayers POV. Neither Andrea nor Doug ever formally agreed with this perspective. As late as St Patrick's Day of this year neither Amal nor Doug have come around to my view on this. I explicitly showed them more PV calculations that support my position and neither had anything to say about them.

I'm digging up more emails if I can to show you what happened in late 2013 and 2014.

Hari

----- Forwarded Message -----

From: Titan, Hari <hstitan@yahoo.com>
To: Chin Bendib Song <schinbendib@piedmont.k12.ca.us>
Sent: Thursday, November 16, 2017, 4:38:36 PM PST
Subject: Fw: Jan 22, 2014 explanation of NPV and discount rates regarding CABs

Hi Song,

Per our conversation about from whose point of view should the present value be calculated: The average Piedmonter or the typical bond investor?

This has a profound impact on the value used as the dollar discounting rate.

If you watch this video from hour 2:00 to 2:41, you'll see many proponents of CABs and how they thought of the discount rates.

http://piedmont.granicus.com/MediaPlayer.php?view_id=3&clip_id=1042

KNN (then Ruth) talks about comparing financing options using present value analysis that was co-presented with Gautam.

Gautam, a local bond industry insider and proponent of CABs, talked about how Piedmonters can reinvest their tax deferrals from CABs in T-bills (3%) or other uses. [The discount rate reflects the bond investor but is couched as a pro-Piedmonter POV]

Board member Roy Tolles insisted that present values was the way to look at it and that the "tricky part" is to get the right discount rate... with higher rates being better for CABs. He also said he was going to "miss" CABs.

Board member Ray Gadboi backed away from CABs in part due the issue being politicized (by me) and now "out of control" and in part because CABs come with premium interest rate.

Sara thought the simplicity of CIBs and the complexity of CABs should be a factor to go for CIBs.

Andrea agreed with KNN and Tolles and Gadboi on the merits of the present value analysis that Gautam had emailed the board.

Then board president Rick Rauchenbush commented that he tries to avoid or get out of debt as soon as possible and was pushing for a 13-year bond versus longer terms. Rick also said that he doesn't have a special investment account for his approximately \$200 in deferred taxes. This is where then board president was favoring a Piedmonter's POV on present value calculations.

At various points each of KNN, Gautam and Andrea mentioned that the idea is for all financing options to end up with the same net present value so it is indifferent if we go for CABs or CIBs. That's only true if using a discount rate that reflects a bond investor POV.

Although I agreed with the idea of net present value calculations, and I've done them for major banks in the area, I disagreed with the 3% discount rate being used by KNN and Gautam. It should be near or below 1% which is closer to what the deferred taxes are returning in a typical savings account (i.e. Piedmonter POV).

That's what gave rise to me reaching out to Elwyn and Bernard to write up this article:

[In Defense of Total Repayments | Community Electronic Town Hall](#)

In Defense of Total Repayments | Commun 

The public backlash against CABs is a common sense reaction to present values not realistically being the same as CIBs because they are using the wrong discount rate.

Since KNN Public Finance is still a subsidiary of a bond underwriter (Zion Bank), I don't see them voluntarily choosing a Piedmonter POV on their calculations. They need direction from the board and likely the board needs advise from your office.

Hari



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Don't let a CAB take you for a ride

Submitted by [Hari Titan](#) on Sun, 12/01/2013 - 10:00am

Last week I mentioned that our School Board will decide in early January on the type of financing for the proposed \$14.5 million Alan Harvey Theater renovation. The choice between Capital Appreciation Bonds (CABs) and Current Interest Bonds (CIBs) offer very different costs to taxpayers.

I have created a web tax estimator to compare these two types of bonds. See <https://HariTitan.com/bond-comparison.pdf> for details. Using the 2012-13 average Piedmont property assessment of \$821,467, a Current Interest Bond with a 1.5 repayment ratio would cost that taxpayer \$5282 in new property taxes over a 25 year duration (\$211 each year). With this CIB, we would pay 50% of the bond amount in interest over 25 years.

If instead we choose a CAB with a repayment ratio of 4, we would pay 300% in interest charges over the same 25 years assuming a 9 year tax holiday and would cost \$14,086 over 25 years (\$880 per year in years 10 through 25).

The default model inputs used are OK for comparison purposes and will change as we learn more about the terms of financing.

From a long-term financial perspective, it is better for us to go for a CIB and the annual tax increase should be affordable. The CAB option is sold on the unproven premise that it is easier to pass a bond measure if we offer a multi-year tax holiday.

A tax holiday reflects a "buy now, pay later" approach that may involve someone else footing the bill for what we borrow, spend and use now. The community should make this value judgement.

My tax calculator also shows that for each \$100,000 property assessment, the average annual tax is \$26 for the CIB and is \$107 for the CAB in year 10. The CIB is well within the \$60 legal requirement (Prop 39), however the CAB bond requires the District property valuation to rise on average 6.7% annually for 9 years. This CAB requirement is risky.

California State Treasurer Bill Lockyer said: "The only people these deals benefit are the financial advisers, who have collected millions of dollars helping school districts sell Capital Appreciation Bonds."

My tax calculator makes it possible to turn abstract repayment multipliers into actual dollar amounts that will show up in our tax bills. This is a huge missing piece of the puzzle that is not being provided by our financial advisers.

Tags:

- [CAB](#)

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Selling Interest

Submitted by [Hari Titan](#) on Thu, 04/10/2014 - 6:31pm

Selling Interest Payments without Debt Reduction

In the 1/22/2014 School Board meeting, the Board decided to remove Capital Appreciation Bonds (CABs) for financing the AHT renovation, at least for now. CABs were removed not because the Board is averse to a higher total taxes or total repayments. The Board stated that the CAB option was removed because of public pressure resulting from reporting in the Piedmont Post. I had confirmed this public sentiment by requesting a copy of the emails sent to the Board and discovered that almost all, with the exception of a resident bond trader, preferred a Current Interest Bond (CIB).

At the Board meeting I requested that the bond measure language or accompanying tax rate statement be amended to exclude CABs and other compound interest bonds as an option. The District also stated that no financing structure could be guaranteed due to changing market conditions. The bond consultant did not speak about any way to minimize the risks to the District in the event of an interest rate hike. One way to do that is to apply an interest rate buffer for the tax rate calculations and tax rates presented to the voters.

The District has gone down a garden path before that led to the issuance of a CAB (Series E) in the amount of \$12 million that puts a \$64 million tax liability for property taxpayers. Here are some Series E graphics that describe the three major elements of a CAB - 1) no payments (new taxes) to the creditor for a certain number of years; 2) interest payments that compound exponentially over time; and 3) pushing repayments until after other debt is paid off.



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Bonding Capacity OK

Submitted by [Hari Titan](#) on Thu, 04/10/2014 - 5:35pm

Bonding capacity is akin to the District's credit line. The District bonding capacity goes up as property assessments go up and each time a long-time resident sells their Piedmont home.

Every time the District borrows money, taxpayers make the payments to the creditors via property taxes (specifically the debt servicing on the left side of the property tax statement).

Having the "bonding capacity" is not the same thing as affordability for the taxpayers.

KNN made a presentation to the Board on Dec 11 which deals with the bonding capacity that will be remaining if the AHT bond measure passes:

http://www.piedmont.k12.ca.us/aboutpusd/agenda.minutes/2012_13/2014_Bond...

The total Assessed Value for all homes in the PUSD is called the AV.

On page 4 it states that assuming a 2% AV growth [which is quite believable unless there is a housing market crash], there will be \$2.4 million left in bonding capacity this year. A continued 2% AV growth will increase the bonding capacity by \$4.8 million (= \$15.9 million

- \$11.1 million) each year.

That means in 3 years we would have bonding capacity for another renovation of this magnitude.

Again, having the "bonding capacity" does not necessarily mean people could afford another renovation. That would require another voter decision.

If people want to make the case against being able afford a renovation, I would not use the "bonding capacity" terminology for that argument.

For "affordability", see:

<http://harititan.com/article/ballot-measure-affordability>

California Education Code Section 15106

15106. A unified school district or community college district may issue bonds that, in aggregation with bonds issued pursuant to Section 15270, shall not exceed 2.5 percent of the taxable property of the school district or community college district, or the school facilities improvement district, if applicable, as shown by the last equalized assessment of the county or counties in which the district is located.

In computing the outstanding bonded indebtedness of a unified school district or community college district for all purposes of this section, any outstanding bonds shall be deemed to have been issued for elementary school purposes, high school purposes, and community college purposes, respectively, in the respective amounts that the proceeds of the sale of those outstanding bonds, excluding any premium and accrued interest received on that sale, were or have been allocated by the governing board of the unified school district or community college district to each of those purposes respectively.

(a) For the purposes of the State School Building Aid Law of 1952 (Chapter 6 (commencing with Section 16000)) with respect to applications for apportionments and apportionments filed or made prior to September 15, 1961, and to the repayment thereof, Chapter 4 (commencing with Section 15700), inclusive, only, a unified school district shall be considered to have a bonding capacity in the amount permitted by law for an elementary school district and a bonding capacity in the amount permitted by law for a high school district.

(b) For purposes of this section, the taxable property of a district for a fiscal year shall be calculated to include, but not be limited to, the assessed value of all unitary and operating nonunitary property of the district, which shall be derived by dividing the gross assessed value of the unitary and operating nonunitary property within the district for the 1987-88 fiscal year by the gross assessed value of all unitary and operating nonunitary property within the county in which the district is located for the 1987-88 fiscal year, and multiplying the result by the gross assessed value of all unitary and operating nonunitary property of the county on the last equalized assessment roll. In the event of the unification of two or more school districts or community college districts subsequent to the 1987-88 fiscal year, the assessed value of all unitary and operating nonunitary property of the unified district or community college district shall be deemed to be the total of the assessed value of the taxable property of each of the unifying districts as that assessed value would be determined under Section 15102.

15270. (a) Notwithstanding Sections 15102 and 15268, any unified school district may issue bonds pursuant to this article that, in aggregation with bonds issued pursuant to Chapter 1 (commencing with Section 15100), may not exceed 2.5 percent of the taxable property of the district as shown by the last equalized assessment of the county or counties in which the district is located. The bonds may only be issued if the tax rate levied to meet the requirements of Section 18 of Article XVI of the California Constitution in the case of indebtedness incurred pursuant to this chapter at a single election, by a unified school district, would not exceed sixty dollars (\$60) per year per one hundred thousand dollars (\$100,000) of taxable property when assessed valuation is projected by the district to increase in accordance with Article XIII A of the California Constitution.

(b) Notwithstanding Sections 15102 and 15268, any community college district may issue bonds pursuant to this article that, in aggregation with bonds issued pursuant to Chapter 1 (commencing with Section 15100), may not exceed 2.5 percent of the taxable property of the district as shown by the last equalized assessment of the county or counties in which the district is located. The bonds may only be issued if the tax rate levied to meet the requirements of Section 18 of Article XVI of the California Constitution in the case of indebtedness incurred pursuant to this chapter at a single election, by a community college district, would not exceed twenty-five dollars (\$25) per year per one hundred thousand dollars (\$100,000) of taxable property when assessed valuation is projected by the district to increase in accordance with Article XIII A of the California Constitution.

(c) In computing the outstanding bonded indebtedness of any unified school district or community college district for all purposes of this section, any outstanding bonds shall be deemed to have been issued for elementary school purposes, high school purposes, and community college purposes, respectively, in the respective amounts that the proceeds of the sale of those outstanding bonds, excluding any premium and accrued interest received on that sale, were or have been allocated by the governing board of the unified school district or community college district to each of those purposes respectively.

(d) For purposes of this section, the taxable property of a district for any fiscal year shall be calculated to include, but not be limited to, the assessed value of all unitary and operating nonunitary property of the district, which shall be derived by dividing the gross assessed value of the unitary and operating nonunitary property within the district for the 1987-88 fiscal year by the gross assessed value of all unitary and operating nonunitary property within the county in which the district is located for the 1987-88 fiscal year, and multiplying the result by the gross assessed value of all unitary and operating nonunitary property of the county on the last equalized assessment roll. In the event of the unification of two or more school districts subsequent to the 1987-88 fiscal year, the assessed value of all unitary and operating nonunitary property of the unified district shall be deemed to be the total of the assessed value of the taxable property of each of the unifying districts as that assessed value would be determined under Section 15268.

(e) For the purposes of this article, "general obligation bonds," as that term is used in Section 18 of Article XVI of the California Constitution, means bonds of a school district or community college district the repayment of which is provided for by this chapter and Chapter 1 (commencing with Section 15100) of Part 10, and includes bonds of a school facilities improvement district the repayment of which is provided for by this chapter and Chapter 2 (commencing with Section 15300).

15102. The total amount of bonds issued pursuant to this chapter and Chapter 1.5 (commencing with Section 15264) shall not exceed 1.25 percent of the taxable property of the school district or community college district, or the school facilities improvement district, if applicable, as shown by the last equalized assessment of the county or counties in which the district is located. For purposes of this section, the taxable property of a district for any fiscal year shall be calculated to include, but not be limited to, the assessed value of all unitary and operating nonunitary property of the district, which shall be derived by dividing the gross assessed value of the unitary and operating nonunitary property within the district for the 1987-88 fiscal year by the gross assessed value of all unitary and operating nonunitary property within the county in which the district is located for the 1987-88 fiscal year, and multiplying that result by the gross assessed value of all unitary and operating nonunitary property of the county on the last equalized assessment roll.

15268. The total amount of bonds issued, including bonds issued pursuant to Chapter 1 (commencing with Section 15100),

shall not exceed 1.25 percent of the taxable property of the district as shown by the last equalized assessment of the county or counties in which the district is located. The bonds may only be issued if the tax rate levied to meet the requirements of Section 18 of Article XVI of the California Constitution in the case of indebtedness incurred by a school district pursuant to this chapter, at a single election, would not exceed thirty dollars (\$30) per year per one hundred thousand dollars (\$100,000) of taxable property when assessed valuation is projected by the district to increase in accordance with Article XIII A of the California Constitution. For purposes of this section, the taxable property of a district for any fiscal year shall be calculated to include, but not be limited to, the assessed value of all unitary and operating nonunitary property of the district, which shall be derived by dividing the gross assessed value of the unitary and operating nonunitary property within the district for the 1987-88 fiscal year by the gross assessed value of all unitary and operating nonunitary property within the county in which the district is located for the 1987-88 fiscal year, and multiplying that result by the gross assessed value of all unitary and operating nonunitary property of the county on the last equalized assessment roll.

Tags:

- [bonds AHT](#)

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Capital Appreciation Bonds

Submitted by [Hari Titan](#) on Sun, 12/08/2013 - 10:59pm

Creative Financing allows the School District to borrow funds and not have to pay the full interest and principal reduction required according to a normal amortization schedule. This is a way to "kick the can down the road" and not deal with the true cost of renovations.

Kicking the can down the road always results in increased interest expenses. We don't need to hire a professional services firm to discover that. We do need to decide as a community if that is the right approach to use when we value renovation projects. From all the responses sent to the Board (that were made available to me), our community frowns on creative financing.

The most egregious type of creative financing is called a Capital Appreciation Bond (CAB). This type of bond is actually a series of zero coupon bonds that mature in different years and typically there are a number of years with no payments to a creditor (bond investor). Each year of maturity have different CUSIPs and could be sold to a different bond investor. For each year of maturity the School District repays the bond investor(s) the principal borrowed plus interest compounded for the number of years borrowed. In finance this is sometimes called a "bullet payment" referencing the expression a "bullet to the head".

For CABs, the School District pays the highest interest charge in the highest year of maturity. That's unlike a regular Current Interest Bond (CIB) which acts more like a fixed rate mortgage with interest charges decreasing over time.

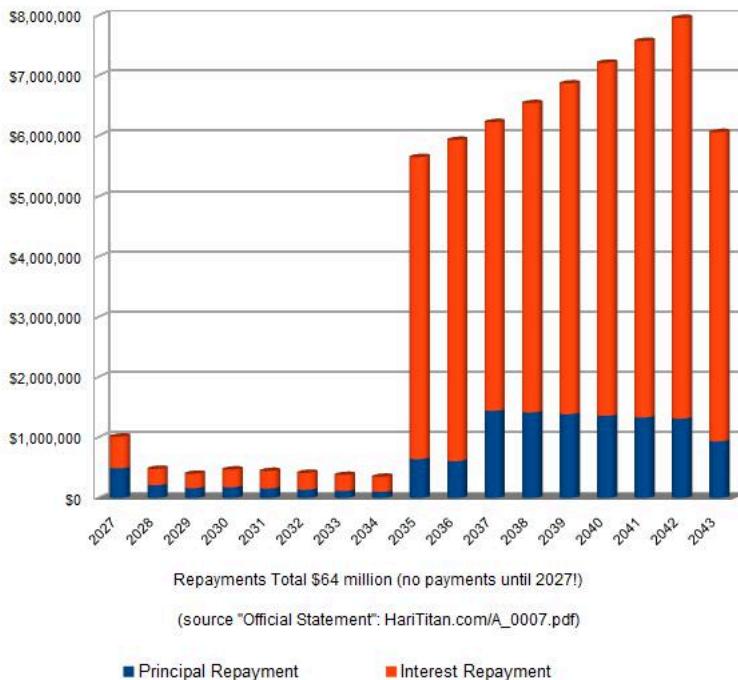
Selling CABs to the debtor (taxpayer in a School District) is a hard sell and often the District is forced by circumstance into purchasing a CAB. This happens when the bond consultant doesn't talk about the total repayment costs for different bond types, doesn't talk about compound interest and tries to frame the selling of the bond as "no tax rate increase" or "will only cost an additional \$20 per \$100,000 assessed value" when a higher rate increase would have avoided using a CAB.

The new law passed by Governor Jerry Brown references "compound interest" 11 times in the legislative record.

PUSD issued a couple of CABs during the 2006 Seismic series of bonds (series B and E). Series E was a loan / bond amount of \$12 million that taxpayers have to pay \$64 million (debt service side of property tax bill) over 30 years. That's \$52 million in interest charges (433% of bond amount):

Capital Appreciation Bond - Series E issued August 2013 PUSD

(Bond Amount \$12 million)



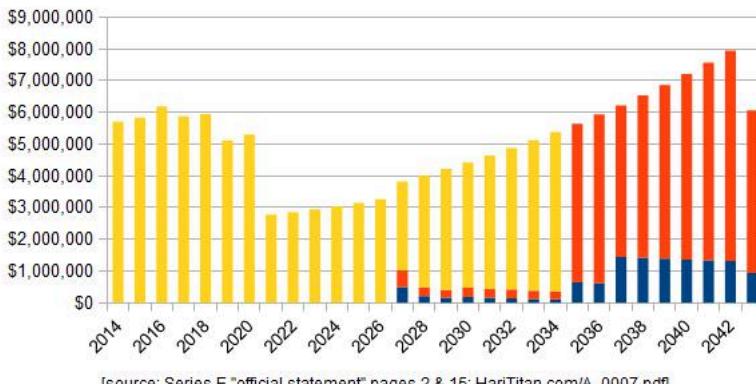
Repayments Total \$64 million (no payments until 2027!)

(source "Official Statement": HariTitan.com/A_0007.pdf)

■ Principal Repayment ■ Interest Repayment

Total Debt Service for PUSD District

(level 5% annual growth rate from 2027-2042)



[source: Series E "official statement" pages 2 & 15: HariTitan.com/A_0007.pdf]

■ Series E Principal Repayment ■ Series E Interest Repayment ■ Other Bond Repayments

From the first graph you can see that interest charges grow as a function of the year of maturity. The data is based on the "Official Statement" for the Series E Capital Appreciation Bond: https://HariTitan.com/A_0007.pdf. The raw data for the graphs (<https://HariTitan.com/SeriesE.pdf>) is at: <https://HariTitan.com/SeriesE.csv> .

These graphics describe the major elements of a CAB - 1) no tax rate increase which means no payments to the creditor for a certain number of years; 2) this pushes repayments until after other debt is paid off and taxing capacity increases; 3) interest payments compound exponentially over time with bullet payments falling under the tax rate limits; 4) staying under the original tax rate forces the total repayment (maturity) further into the future.

The Series E bond in theory are subject to redemption (i.e. can be refinanced) in 2023. However the legal conditions to do so (like a \$25 million bonding capacity) are unrealistic to hope for.

School Board member Andrea Swenson (ex Lehman Bros.) consulted Doug Ireland (ex Lehman Bros.) regarding the use of CABs.

The Piedmont bond consultant KNN Public Finance posted four alternative financing options for the Alan Harvey Theater bond. These proposals include a 15-year Capital Appreciation Bond (Option 1), 13-year and 25-year Current Interest Bonds (Options 2 & 3), and a 13-year Interest-only + CIB Hybrid (Option 4).

Our community pressure worked and KNN focused on lower total taxes (repayments) over the life of the bonds. Remember that the August 2013 CAB (Series E) had a repayment multiplier of 5.33. All KNN's new options have a multiplier below 2. The new CAB option achieved this feat with a 4 year tax holiday (compared to 13 years for the August CAB) and a 15 year term (compared to a 25 year term for the August CAB). KNN also changed the way the new CAB makes repayments, to be more level compared to the August CAB. This strategy is closer to the way my Bond comparison tool works: <https://HariTitan.com/bond-tax-comparison.htm>

Despite these improvements the CAB Option is still \$6.8 million more expensive than CIB Option 2 for a \$15 million bond. The Interest-only Hybrid is \$2.5 million more expensive than CIB Option 2.

CIB Option 3 is a longer term debt designed to share the tax load over 25 years, which raises costs but keeps the tax increase lower.

Another important consideration against the CAB and Interest-only Options is that by ramping up payments to creditors in 2018 and 2020, they offset the expected tax drop when older bonds mature in those years. This uses up the District's future bond capacity and so takes away the power of a future School Board to fund future renovations (replacing Witter Field or upgrading science labs?) or to make other capital improvements that may become necessary by then.

The KNN presentation is:

http://www.piedmont.k12.ca.us/aboutpusd/agenda.minutes/2012_13/2014_Bond...

I have more background info on CABs:

<https://HariTitan.com/bond-comparison.pdf> (more detailed but using legal maximum)

The current School Board has indicated that it cannot impose any financing structure on the new Board. Therefore it matters who is elected to the new Board and if they have a taxpayer POV or an investment banker POV.

The Candidates were queried on their opinion on the use of Capital Appreciation Bonds versus Current Interest Bonds:

Doug Ireland: ...There are a variety of structures available to the Board in terms of interest rates, maturities and payment schedules. Until the requirements are established, it is premature to designate which form of payment is preferable...

Amal Smith: The bad press around CABs is from more recent use by school districts who have issued CABs with maturity dates as long as 40 years and with bond retirement costs as high as 10+ times the amount borrowed... recent legislation (AB 132) signed by Governor Brown that limits CABs to no more than 25 years and a maximum debt repayment ratio of 4-1.

Hari Titan: CABs should only be used if (1) CIBs are not an option for the required bond and (2) voters are told (as part of the bond measure disclosures) that a CAB may be used and what the total repayment amounts are expected to be

The full answers are available on the SmartVoter website: <http://smartvoter.org/2014/02/04/ca/alm/race/1/questions.html>

Tags:

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Bond Comparison Tool

Submitted by [Hari Titan](#) on Fri, 09/11/2015 - 9:20pm

The following tool compares Current Interest Bonds (CIBs) with Capital Appreciation Bonds (CABs):

<https://HariTitan.com/bond-tax-comparison.htm>

It requires the total assessed valuation for the school district and your individual assessed valuation as inputs.

It also requires the bond amount(s), the interest rates, the life of the bonds and the first year of taxation for the CAB as inputs.

These inputs are in yellow.

The first calculated field is the repayment multiplier (a.k.a. repayment ratio) for each bond type. This value is based on certain assumptions that are annotated at the bottom of the calculator. If your bond consultant is using a different scenario (e.g. level total tax) and has produced a more accurate repayment ratio, you can override the calculated value with this more accurate value.

The "Total Tax" is also the total repayments (principal and interest) being made to the bond investors over the life of the bond.

The "comparable interest rate" for the CAB can be used as an input for the CIB interest rate and as long as all other inputs are the same will produce the same Total Tax for the CIB as the CAB.

The green part of the results relate to "Portion of the Total Taxes" and is per the year of the assessed valuation.

Most of this valuation will grow at the rate limited by Prop 13. However many people will sell their home during the life of the bond and this will often result in a significant increase in the total assessed valuation for the school district. This calculator does not distinguish (or allow discrimination of) tax liabilities for current homeowners versus new residents moving in during the life of the bond. The reported tax liability per \$100,000 should be considered the average liability for that portion of your property, not the tax liability for a specific homeowner. Homeowners that stay for the duration of the bond will have a lower tax liability and newcomers will typically have a higher tax liability.

The blue part of the results relate to annual tax liabilities which are regulated in California law and are another metric for the "affordability" of the bonds.

Tags:

- [CAB](#)

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In Defense of Total Repayments

Submitted by [Hari Titan](#) on Sun, 02/09/2014 - 2:40pm

By: Elwyn Berlekamp, Bernard Pech, Hari Titan

The School Board has taken to the idea that taxes can be deferred and reinvested to earn a safe return high enough to significantly discount the cost of additional interest charges. This safe return has been chosen to be between 3% and 4% based on a mix of long term Treasuries. The School Board has asserted that as a result of this "discount rate", all financing options including CIBs, interest-only hybrids and CABs cost very close to the same amount! We question this assertion on a number of grounds.

The application of a discount rate assumes the taxpayer already has something equivalent to these financial instruments or plans to get them in their brokerage account when the School Board decides on a financing scheme that defers taxes. Most taxpayers will find this a hassle to do. Piedmont issued a CAB in August 2013 (Series E) but taxpayers were not informed that the discount rate assumptions required reinvestment.

Also for an individual taxpayer the amount deferred is so low (\$100 - \$200 per tax bill, for the typical appraised value in Piedmont) that transaction fees getting in and out of these safe investments will eat into their returns. This taxpayer would need to make 2 transactions per year, investing the "savings" every time they pay their lower property taxes, slowly building up their investment until it is time to start cashing out and paying the deferred taxes. All this effort by the taxpayer is in stark contrast to the simplicity of the investors who

lent money to the District in the first place (e.g. buying the Series E bonds). Those lenders did one transaction and got a virtually guaranteed (AA-) safe return that compounds automatically.

For most taxpayers, deferred taxes will realistically end up in higher risk investments like the stock market, or in near zero return savings accounts, or end up spending on consumer goods, travel etc. (which is effectively a 100% loss from a reinvestment POV). Reporting the total repayment costs and repayment multipliers inherently assumes a zero discount rate on unpaid taxes with no assumption on reinvestment.

Comparing repayment multipliers correctly shows the investment challenge posed to those taxpayers who do want to reinvest deferred taxes. Applying a discount rate analysis for the whole community makes unrealistic assumptions of how taxpayers will behave in the future.

[For additional context see School Board discussion around present values from hour 2:00 to 2:42 here:
http://piedmont.granicus.com/MediaPlayer.php?view_id=3&clip_id=1042]

=====

Berlekamp received his PhD from MIT in 1964 and became Professor of Electrical Engineering, Computer Science, and Mathematics at UC Berkeley. Berlekamp also managed an algorithmic trading fund known as Medallion. Under him, the fund's one-year return to investors in 1990 was 55%. He then sold the company to Renaissance Technologies. According to the Wall Street Journal, this fund continued to provide the highest returns of any hedge fund until 2005, with Soros' Quantum Fund coming in second.

Pech received his BA in Mathematics from the University of Paris, his Physics degree from École Nationale Supérieure des Télécommunications, and his MS in Electrical Engineering and Computer Science from UC Berkeley (1970). He is now retired after a forty years career in Silicon Valley spanning product companies (salesforce.com, Siebel), service companies (Teknekron), and University/Government Laboratory research organizations (UC Berkeley, Lawrence Berkeley Laboratory).

Titan received his PhD in Computer Science from the University of Waterloo in 1993. Hari is a Big-Data Scientist and has focused on forecasting and risk management using diverse and large volumes of customer and economic data. Hari is the inventor of U.S. Patent #US5745654 used in the Fair Isaac credit card fraud prevention system. Hari has written extensively regarding creative financing options being presented to the Piedmont Unified School District, built a [bond comparison tool](#) and ran for the School Board in 2014.

Tags:

- [CAB](#)

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Bernard Pech

11 years ago

To get the background context, please read the email sent by Mr. Gautam Wadhwani to the Board (starts at [page 5 of Jan Board Correspondence](#)), and listen to [hour 2 to 2:30 of the January 22 Board meeting recording](#).

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CABs benefit Bond Investors not Taxpayers

Submitted by [Hari Titan](#) on Wed, 09/12/2018 - 9:43pm



PRESS RELEASE

www.piedmont.k12.ca.us

December 15, 2017

Piedmont Unified School District Saves Taxpayers More Than \$26.1 Million with Bond Refinancing

On Tuesday, December 12th, the Piedmont Unified School District issued \$27 million of 2017B General Obligation Refunding Bonds. Through the refinancing, property owners within the District will save more than \$26.1 million over the remaining life of the bonds, equal to approximately \$10.85 million in present value savings or 68.14% of bonds refunded. The substantial amount of savings generated from this refunding are primarily attributable to the Board's decision to replace outstanding Capital Appreciation Bonds (CABs) with more cost effective Current Interest Bonds (CIBs). Refunding bonds, which are similar in purpose to refinancing a home mortgage, pay off existing debt with funds borrowed at a lower interest cost.

The December 15, 2017 bond refinance was very tricky in that the original 2013 bond had a 10-year no-refinance clause. The refinance required creating a parallel bond with a trigger mechanism to pay off the 2013 CAB in 2023.

Some of the savings from this refinance came from a change in interest rates but the bulk of it came from eliminating unpaid interest charges compounding from 2023 to 2043.

The easiest way to describe CABs is to think of reverse mortgages. They both came on the scene in the early to mid-2000s and involve not making interest payments that accrue on top of the principal amount borrowed in an exponentially compounding manner. This is also called negative amortization which creates additional debt to the community that does not benefit students. It is unproductive debt.

CABs are the opposite to Measure H1. Measure H1 is expensive because it improves a lot of facilities. Design and construction is productive work that will arguably improve the environment for student learning. People may disagree on whether it was worth the price tag but the fact that it is debt for productive uses was never in question.

Compound interest charges in CABs primarily benefit bond investors because it saves them the effort to find investments if we had been making interest payments twice a year (on property tax days).

How much would it have cost to finance Havens with pay-as-you-go financing scheme (i.e. fully amortizing CIBs) to begin with in 2013? Approx. \$211 per year for the average assessment in Piedmont, click here for more details. That amount is too low to create an investment strategy or personally benefit from deferred taxation.

Going with a CIB to begin with in 2013 would have saved another \$18.8 million in now unrecoverable compound interest charges.

Why then did taxpayers want to choose CABs? After the public became aware of the true cost of CABs, in various polls and letters to the board 95% of the respondents wanted nothing to do with CABs. In reviewing the names of the respondents, most had exposure to my writings on CABs and independently convinced themselves CABs are predatory. Most also had kids in the district because few people without kids in the district ever got district communications regarding this financing choice that affects them as well.

It turns out that the opinion of taxpayers is not essential to a municipal entity (e.g. a school board) when it comes to refinancing bonds already on the books. In 2013, the school board issued a CAB without presenting alternatives to the public or providing notice to the public. The main person on point for the decision turned out to be a bond investor themselves who invested in the 2013 CAB and later got on the school board and will be profiting a portion of the \$18.8 million from the choice of going with a CAB. With the departure of this board member, 50% of the remaining board still wants to see CABs as an option on the table every time we do new financing.

When people get a refinance of their mortgage, hardly anyone says:

I also want to see your best pitch for a reverse mortgage.

Unfortunately for CABs in PUSD the pitches have kept changing and each time have contained financial models fraught with unreasonable assumptions that were not noticed by anyone in the district or board. This created unnecessary pressure on citizen taxpayers to read through the materials, find the flaws, show up and speak up at board meetings.

Since I know CABs to be unnecessary and more costly to all taxpayers over the life of the bond, and the non-bond-investor public who is aware of these instruments doesn't want them, and these products have been discredited in the press and hardly any part of the country is issuing them anymore, it seems to me that we should make issuing CABs a very transparent process that gets permission from all taxpayers including the 60% without kids in the district. In other words, a bond election.

I am the only candidate who guarantees to tip the balance of the board against these instruments and can guarantee to use CIBs for all future financing unless we need to go to a bond election.

This would be my next contribution for protecting the community from predatory bond instruments.

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The moment \$18.8 million was lost

Submitted by [Hari Titan](#) on Sat, 10/20/2018 - 9:07am

Rick Raushenbush, Former Piedmont School Board Member

In Rick's Piedmont Civic Association [Oct 17, 2018 article](#) he makes the following statements that I challenge or refute below. I copied and pasted his comments and have my own numbering. See his original article for additional context.

1. First, the District and the School Board clearly understood the difference between Current Interest Bonds (CIBs) and Capital Appreciation Bonds (CABs), as well as Qualified School Construction Bonds (QSCBs) and Bond Anticipation Notes (BANs). These financing mechanisms, their pros and cons, were discussed in public meetings back to 2006.

Very roughly speaking, CIBs reduce total interest payments by levying taxes at a higher rate to pay down the debt starting immediately, while CABs reduce the immediate tax rate at the cost of greater total interest payments by deferring repayment of the debt. -- Rick Raushenbush 2018

2. Pursuant to statute, anticipated tax rates to repay bonds issued under Measure E were limited to \$60 per \$100,000 in assessed value. The District could not have sold CIBs to fund this work as the tax rate to repay the bonds would have exceeded the limit.
3. I do not recall anyone, including current School Board candidates, appearing before the School Board at the time to argue that Wildwood and Beach work should be deferred for years to reduce total interest payments.

4. Third, refinancing bonds to save money is not a new concept. Even before the CABs were sold, the Board and District anticipated re-financing them as soon as it was possible to do so (call dates were set as soon as feasible given market requirements)
5. Fourth, the School Board, well aware that CABs keep current tax rates lower only by increasing total interest payments, has chosen CIBs over CABs when available. In 2014, when proposing a bond measure to fix Alan Harvey Theater, the Board ruled out using CABs as the feasible tax rate supported the CIB option. No one on the Board was advocating CABs.
6. According to Minutes of the Nov. 8, 2017 meeting, however, "Hari Titan encouraged the Board to wait for at least a year on CAB refinancing."

Rick never contacted me about his beliefs but my responses are below.

Hari Titan's Responses

1. Rick did not produce any links to public discussions back in 2006. Although technically these discussions are open to the public most of the public is unaware of what they are about. His 2018 "roughly speaking" description is to this day overly simplified and misses key financial concepts, the absence of which mislead the public regarding the negative side of CABs. For example Rick does not mention any of the following: **deferred taxation, compound interest, negative amortization, balloon payments, above market interest rates, increasing debt, non-productive debt**. I have been educating the public about these aspects which led to the vast majority of the public not wanting CABs.
2. In the October 11, 2017 meeting to refinance the 2013 CAB at H:M:S 1:35:16 - onwards it is revealed that as long as there are savings to the public from a refinance, the new refinance can go over the prior \$60/\$100k AV limits. This was new information from district bond counsel that was not discussed (and likely not known) at the May 8, 2013 board meeting prior to issuing the 2013 CAB.
3. My proposal was not to defer the work and financing in 2013 but to use CIBs by getting a new voter authorization, see my article [here](#). In the May 2013 board meeting, KNN Public Finance confirms that a new voter authorization would provide a new \$60/\$100k AV limit, see: http://piedmont.granicus.com/MediaPlayer.php?view_id=3&clip_id=916 Minute 1:06
4. Maintaining the no-refinance clause to 10-years per market demands for CABs is not the same thing as planning to do a refinance of the CABs. There is no record of board members actually stating their wish for refinancing the upcoming August 2013 CAB in their May 2013 board meeting: http://piedmont.granicus.com/MediaPlayer.php?view_id=3&clip_id=916 Check Minutes 0:44 - 1:07 . In fact we did the 2017 refinance of the 2013 CAB before the 10-year no-refinance clause expired. Board members at the time did not balk at or comment on the high repayment multipliers from 4:1 to 5.6:1 and only CABs were on the table at that time.
5. Measure H had CABs as Option 1 even though there was no existing \$60/\$100k AV limitation. The board voluntarily put CABs on the table and then removed it in favor of CIBs. It shows that the board was not just putting CABs on the table because they thought they were forced to by Prop 39 but instead that they were relying on what I would say is a faulty presentation of present value arguments that don't apply to taxpayers but apply to bond investors. Andrea Swenson invited KNN Public Finance and another community member to do the advocating for CABs. I was the only community member to oppose CABs at this meeting and a few earlier meetings. Here is the video to follow along with the proponents of CABs: http://piedmont.granicus.com/MediaPlayer.php?view_id=3&clip_id=1042 see Minutes 2:00 - 2:41
6. The minutes of the meeting ignores that I changed my opinion in that meeting based on new information from KNN Public Finance. Here is a link to the actual video of the meeting: http://piedmont.granicus.com/MediaPlayer.php?view_id=3&clip_id=1688 Initially at minute 54 second 47 I say: "Even if the Fed dot plot is correct and the interest rates will go up 75 basis points next year, it may be well worth just waiting to see if that is really going to happen. We have a new Fed chairman who has made verbal statements to not increase rates.... we could wait and monitor interest rates." However at minute 1:25, based on the new information provided by KNN I switch my recommendation to: "I'm with Cory given this new information... maybe the best thing for the community is to take action now and go with Option B... I would give a thumbs up if the board took action now."

In summary, the board in 2013 missed 2 approaches to avoiding the 2013 CAB. One approach was to get a new voter authorization and another approach was to consult with bond counsel and find out if a new voter authorization was even required.

Furthermore and consistent with the above video evidence, KNN Public Finance told me that they were not asked to run numbers for a CIB option in 2013 because the board was not interested in CIBs at that time.

The \$18.8 million irreparable loss was calculated by starting with the total repayment if we had stayed with CABs (\$64 million) and subtracting the savings reported by the school district (\$26.2 million) and also subtracting the total repayment if we issued a CIB in 2013 (\$19 million). Issuing a CIB in 2013 was allowed by the same logic we were able to issue one in 2017... the \$60/\$100k AV limit only applies to a newly issued bond and not to subsequent refinancings of the bond.

The actual moment the \$18.8 million was lost was at 1 hour and 6 minutes into the May 8, 2013 board meeting when KNN points out (in response to Tolles) that a new voter authorization would grant a new \$60/\$100k AV limitation. Nobody on the board asked if such a new voter authorization would allow CIBs back on the table and what those savings would be.

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Moratorium on CABs

Submitted by [Hari Titan](#) on Tue, 05/13/2014 - 4:23pm

KNN Public Finance is the outside consultant that Piedmont Unified uses to help craft bond measure options.

KNN Public Finance is also used by the San Leandro School District.

In one of the reports KNN did for San Leandro, KNN stated a moratorium on CABs was issued to all School Districts in California:

On January 17, 2013, State Superintendent of Public Instruction Tom Torlakson and State Treasurer Bill Lockyer sent a letter to all school districts asking for a “moratorium” on issuing CABs until the Legislature and the Governor decide on reforms.

<http://www.sanleandro.k12.ca.us/cms/lib07/CA01001252/Centricity/Domain/2...>
(slide 7)

I did not see any mention of this fact in the reports KNN created for Piedmont and I don't know if the Piedmont School Board was aware of this 2013 moratorium.

The above presentation goes on to say:

On January 24, 2013, Assembly Members Buchanan and Hueso introduced legislation (AB 182) that will:

1. Restrict school districts from issuing under the Government Code, which allowed for up to 40 year repayment. Schools will only be allowed to issue under Education Code, which limits the repayment term to 25 years.
2. Require CAB repayment to be no more than 4 times the original principal amount.
3. Require more disclosure up-front, at a Board meeting, when CABs will be issued.

This legislation (AB 182) was passed in late 2013 and made effective January 1, 2014.

As we know, Piedmont Unified issued a CAB in August 2013 (Seismic Safety Bond, Series E) that has a repayment of 5.33 times the original principal amount, has a 30 year repayment term and was not fully disclosed to the public at a Board meeting prior to issuance and is not callable (ability to refinance) for 10 years.

In other words Series E violates 3 rules of AB 182 (listed above) and was issued while the CAB moratorium was in effect.

I don't know if this moratorium had a "grandfather" clause that allows CABs to be issued in 2013 if they were part of an earlier (e.g. 2006) voter authorization.

For a way out to stay in compliance with the moratorium and achieve District goals, see an alternative financial arrangement that could have been done: <http://harititan.com/article/free-AHT>

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Hari Titan

7 years ago edited

Per Bernard Pech, AB 182 allows for a 10 year delay in being able to refinance a CAB:

15144.2. A bond that allows for the compounding of interest, including, but not limited to, a capital appreciation bond, maturing more than 10 years after its date of issuance shall be subject to redemption before its fixed maturity date, with or without a premium, at any time, or from time to time, at the option of the issuer, beginning no later than the 10th anniversary of the date the bond that allows for the compounding of interest was issued.

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Fw: Refinance Capital Appreciation Bonds - Link Update

From: Titan, Hari (hstitan@yahoo.com)
To: tpsnyder@xantrion.com
Date: Monday, September 4, 2023 at 03:14 PM PDT

Hi Tom,

In case you want to read more about Capital Appreciation Bonds, I still have my old website running, although you need a link to a subpage to see it. The main page of harititan.com redirects to the 501(c)(4) PEEP website.

While Doug was Head of Fixed Income at Lehman Bros, I was working in credit card risk management.

Just about everyone knows what happens if someone doesn't pay their credit card bill... compound interest and penalty charges get tacked on top of the original principal. This new part of the debt is non-productive. In other words, you are not getting more product for it.

A good starting article is here:

[Capital Appreciation Bonds | Digital Town Hall](#)

It has links for the \$12 M bond refinanced to a CAB in 2013.

I wrote a number of Letters to the Editor and/or Opinion pieces for the Piedmont Post here: <https://harititan.com/tags/cab>

These articles and a public survey got close to 60 people focused on the 2013 CAB as being problematic and in need of a refinance. Cory Smegal was convinced I was right about my entire 2016 campaign but would not agree to a mutual endorsement. Obviously, I was not approved by either Ireland or Glazier.

Getting around 60 folks hyper-interested in this matter helped get Sara Pearson and Andrea Swenson on board with a refinance.

Amal was waiting for the last holdout, Doug Ireland, who wanted another CAB at a lower interest rate instead.

Ultimately another LTE from me in the Piedmont Post and the back-and-forth with the school board (shown below) helped eliminate that option.

At a subsequent board meeting in 2017 (Nov/Dec), the school district refinanced the 2013 school bond with a CIB (Current Interest Bond).

The original 2013 bond had a 10-year no-finance clause that resulted in Piedmont taxpayers getting stiffed with 10 years of compounding interest due at the 2017 refinance. That's partly why the principal amount was much higher in 2017. We still owe interest on the higher principal amount. That's how we ended up with over \$18 M due to a bad refinance in 2013 in the first place.

The email below is just for evidence of the work I had to do in order to get the board on the right path.

Hari

----- Forwarded Message -----

From: Amal Smith <amalsmith@piedmont.k12.ca.us>
To: Titan, Hari <hstitan@yahoo.com>
Cc: Sarah Pearson <spearson@piedmont.k12.ca.us>; Andrea Swenson <aswenson@piedmont.k12.ca.us>; csmegal@piedmont.k12.ca.us <csmegal@piedmont.k12.ca.us>; Doug Ireland <direland@piedmont.k12.ca.us>; Sarah Pearson <srpear@gmail.com>; Andrea Swenson <swensonaa@aol.com>; Cory Smegal

<corysmegal@gmail.com>; Amal Smith <4smiths228@comcast.net>; Doug Ireland <dougmireland@me.com>; Randal Booker <rbooker@piedmont.k12.ca.us>; Chin Bendib Song <schinbendib@piedmont.k12.ca.us>

Sent: Monday, October 30, 2017, 2:01:54 PM PDT

Subject: Re: Fw: Fw: Refinance Capital Appreciation Bonds - Link Update

On behalf of the board, thank you for your continued interest in the debt financing issues that face the district. Your input will, I'm sure, be taken into account as the board agenda and support documentation are considered.

I'd like to provide my own responses to some the items you include in your email.

I would like to make a suggestion that the board consider banning CABs in Piedmont all together so we don't have to debate this issue over and over again. **As you know, the school board at the time** expected that the Measure E CABs would be refunded in order to reduce the costs. I agree with you that CABs are not a preferred option, but I would not want to change our policy to limit the ability of future boards to use available financial instruments in circumstances that I cannot foresee. I would support language that would state that CIBs are generally our preferred option.

Since this option came at the behest of Stifel (in the interest of their investors), it gives the appearance that the board is not thinking independently and deciding what's best for the taxpayers. **As the board has** stated, the option was presented to us and a working group that included Mr. Ireland, Ms. Smegal, Ms. Chin-Bendib, Mr. Hosler (I'm likely forgetting others) reviewed the options, using their input and suggestions to inform the initial KNN presentation. The option from Stifel was not taken at face value.

Failing that I would like to suggest that CABs be taken off the table for this refunding, in part because of the vast majority of respondents were against it. **Thank you for this suggestion, however I would expect all major options are made available to the board and to the public. Not all options may be palatable, but they should be included in the list of what is available for consideration.**

I would also suggest removing references to the \$60 / \$100k statutorily limit based on our collective understanding that it is not a driver behind the refunding. **It may not be necessary for this decision, but I do think it is important contextual information to be included.**

Also could you forward me the letters / emails you've received so far? **I've forwarded your request to Randy to make sure what we send to you complies with the requirements of the Public Records Act.**

Thank you, again.

Respectfully,

Amal

On Thu, Oct 26, 2017 at 9:01 AM, Titan, Hari <hstitan@yahoo.com> wrote:

Thanks Amal.

I would like to make a suggestion that the board consider banning CABs in Piedmont all together so we don't have to debate this issue over and over again. Since this option came at the behest of Stifel (in the interest of their investors), it gives the appearance that the board is not thinking independently and deciding what's best for the taxpayers.

Failing that I would like to suggest that CABs be taken off the table for this refunding, in part because of the vast majority of respondents were against it.

I would also like the public to see the \$22.89 million tax savings option that didn't appear in the prior meeting's PowerPoint.

If agreed, the board should direct KNN to produce a new PowerPoint, removing the CAB to CAB option and replace the generic "wait and see" option with the option to monitor interest rates for a trend reversal and refinance no later than 2023 with an estimated tax savings of \$22.89 million.

The vast majority of respondents did want to refinance and wanted the CAB to CIB option. This would show the tax savings for 2 CAB to CIB options, one to be initiated on December 5, 2017 and the other no later than August 1, 2023.

The board could also direct KNN to use a more defensible fixed rate ROI for the present value calculations. Good money market rates 1.2% APR which is likely what the typical Piedmonter is getting on their deposits.

I would also suggest removing references to the \$60 / \$100k statutorily limit based on our collective understanding that it is not a driver behind the refunding.

I would also suggest the board direct KNN to provide an interest rate trend curve (like the one I provided) to be included in the new PowerPoint so as to provide the public with the same level of insight we discussed in the meeting yesterday.

Also could you forward me the letters / emails you've received so far?

Let me know.

Thanks.

Hari

From: Amal Smith <amalsmith@piedmont.k12.ca.us>
To: "Titan, Hari" <hstitan@yahoo.com>
Cc: Sarah Pearson <spearson@piedmont.k12.ca.us>; Andrea Swenson <aswenson@piedmont.k12.ca.us>; "csmegal@piedmont.k12.ca.us" <csmegal@piedmont.k12.ca.us>; Doug Ireland <direland@piedmont.k12.ca.us>; Sarah Pearson <spear@gmail.com>; Andrea Swenson <swensonaa@aol.com>; Cory Smegal <corysmegal@gmail.com>; Amal Smith <4smiths228@comcast.net>; Doug Ireland <dougmireland@me.com>; Randal Booker <rbooker@piedmont.k12.ca.us>; Chin Bendib Song <schinbendib@piedmont.k12.ca.us>
Sent: Thursday, October 26, 2017 5:26 AM
Subject: Re: Fw: Fw: Refinance Capital Appreciation Bonds - Link Update

Thank you, Hari, on behalf of the school board for your analysis and input on the proposal to refinance the District's capital appreciation bonds. It is very helpful to the board to hear from the community.

We appreciate, too, the questions you posed. Thanks, Song, for your quick response to Mr. Titan's email. Please let us know if you have additional questions.

Amal

On Wed, Oct 25, 2017 at 12:05 PM, Titan, Hari <hstitan@yahoo.com> wrote:

October 25, 2017

Distinguished School Board members, Superintendent Booker and District Staff

Dear Friends,

Since 2013 I have followed the District's consideration of bond funding, and provided detailed written and verbal comments. I've also written for the Piedmont Post and online (<http://harititan.com/search/node/CAB> e.g. <http://harititan.com/article/capital-appreciation-bonds>)

to bring the public into the debate. As you will recall, my review of KNN's calculations, and my independent calculations, have shown that CABs yield unnecessarily higher total tax liability due to compound interest on initially deferred taxation. Both Measures H and H1 ended up explicitly excluding the use of CABs.

I am puzzled why replacing a CAB with another CAB is on the table as a refunding option in 2017. KNN's latest numbers again show that CABs will cost Piedmont taxpayers more over the life of the bonds.

Below are some additional observations.

KNN hasn't quantified the option of refinancing Series E to a CIB in 2023

In 2014 I floated the idea of refunding Series E in a Piedmont Post article, see <http://harititan.com/article/early-redemption>. The idea was to convert the CAB to a CIB for a nominal tax liability savings of \$24 MM and a reduced bonding capacity of \$13 MM.

The board should direct KNN to quantify this option (post H1) since this appears to provide the best tax savings.

Artificial Sense of Urgency

The December 5, 2017 refunding date appears arbitrary.

A refunding is not required to facilitate Measure H1 and in fact reduces bonding capacity because the unpaid compound interest has increased the face value of the new bond compared to Series E. That's also why the wait and see option is on the table.

December 5, 2017 also has no special meaning within the Series E Official Statement (see http://www.harititan.com/A_0007.pdf) Page 5 of that document discusses early redemptions. The date August 1, 2023 has special meaning within Series E.

The December 5, 2017 timing appears to come from the underwriter Stifel pushing for a transaction this year and statements that the 2006 Election bonds (which include Series E) are "*currently projected to exceed the statutory maximum of \$60/\$100,000 of assessed value as early as 2023.*" (see 2017 KNN Refunding PowerPoint page 1)

The "current" projection shortcomings lead to the following questions in my mind:

1. What was KNN's projection / forecast at the time of issuance of Series E in 2013?
2. What changed since then and why?
3. Is there a legal obligation to refund bonds if the projection at issuance ends up wrong?
4. Can projections or forecasts ever be guaranteed?
5. Are the 2013 projections actually wrong or is there just another projection which could also be wrong?

KNN's 2013 AHT Proposal page 12 revealed a 5% property valuation annual growth rate assumption being used at the time of issuance of Series E. Page 11 of the 2017 KNN Refunding PowerPoint shows a lower 3.5% property valuation annual growth rate assumption.

The annual valuation (A.V.) growth rate is the key driver behind the calculation of the \$60 taxes / \$100,000 A.V. statutory limitation and explains why at the time of bond issuance, there didn't seem to be any problem.

The AV growth assumption drop from 5% to 3.5% answers the what part of my 2nd question but doesn't answer the why part. On page 11 (line 1) of the 2017 PowerPoint, KNN themselves suggest the 2018 AV growth for Piedmont is believed to be 5.44%. So I am puzzled by the bearishness of the 2017 KNN proposal compared to KNN in 2013.

I don't have an answer to my 3rd question and perhaps we should ask both KNN and our legal counsel this question. The impression I got from Ruth formerly of KNN and others is no.

I think I have an answer to my 4th question. Luckily our H1 bond series are CIBs and assume a 2% A.V. growth rate. That 2% is essentially forced by Prop 13 and requires no sales bringing property valuations to market prices. It's a very conservative and therefore safe assumption. I expect no panicked refundings of H1 bonds due to a bad projection.

For question 5, clearly this is a competition between two projections, either of which could be wrong. The initial 5% AV growth projection has held true between 2013 and 2017 so it's not actually wrong so far.

Tax Savings fall short of waiting until 2023 to refund

Refunding Scenario A - CAB to CAB is proposed to save a nominal \$11,295,000 (page 4 of the 2017 KNN PowerPoint).

Refunding Scenario B - CAB to CIB is proposed to save a nominal \$19,543,800 (page 5 of the 2017 KNN PowerPoint).

Both scenarios refund on December 5, 2017 (very short notice) and fall short of the \$24 MM savings from waiting to refund in 2023.

PUSD should not be issuing CABs for any reason

Scenario A is a CAB has the lowest tax savings and goes down the path of temporarily increasing the number of outstanding CABs unnecessarily.

Former California State Treasurer Bill Lockyer said: "The only people these deals benefit are the financial advisers, who have collected millions of dollars helping school districts sell Capital Appreciation Bonds."

KNN was the same agency that tried to spin CABs as "wrap-around" bonds and then used present value calculations that have been debunked by pioneer and expert Dr. Berlekamp here: <http://harititan.com/article/ defense-total-repayments>. KNN's latest presentation also fails to mention unnecessary taxes from compound interest in reference to CABs and never informed the Piedmont public about a 2013 moratorium on CABs.

I also have an article explaining how the Series E CAB could have been avoided all together: <http://harititan.com/article/ new-theater-free>

Refunding Scenario A - CAB to CAB should be rejected outright.

PUSD should save the bonding capacity for a rainy day

There is no real sense of urgency to go for either Scenario A or B on December 5, 2017. We should keep the bonding capacity through 2023 for a rainy day.

KNN claims to have a solution for Scenario B using something they call "crossover refunding".

Can the school board vouch that the assumptions behind crossover refunding are sustainable and we will not be back to refunding with more transaction fees going to Stifel and KNN?

Bad Timing

Piedmonters just got hit with higher taxes for Measure H1. However we should not use that as an excuse to bring back CABs.

Conclusion

Best to worst options:

1.

Plan on a CAB to CIB refund in 2023 but monitor interest rates in case the underlying economic fundamentals start to soar and interest rates start rising.

- 2.
- Plan on a CAB to CIB refund on December 5, 2017 with "crossover refunding".
- 3.
- ~~Plan on a CAB to CAB refund on December 5, 2017.~~

Hari Titan

I refer to the following documents:

[2013 KNN AHT Proposal] w/ references to Election 2006 a.k.a. Seismic Safety Bonds
http://www.piedmont.k12.ca.us/aboutpusd/agenda.minutes/2012_13/2014_Bond-Options.pdf

[2017 KNN Refunding Proposal] <https://agendaonline.net/public/Meeting/Attachments/DisplayAttachment.aspx?AttachmentID=689484&IsArchive=0>

[2017 KNN Refunding PowerPoint] (attached)

----- Forwarded Message -----

From: Song Chin Bendib <schinbendib@piedmont.k12.ca.us>
To: "Titan, Hari" <hstitan@yahoo.com>
Cc: Randal Booker <rbooker@piedmont.k12.ca.us>; Blake Boehm <bboehm@knninc.com>
Sent: Tuesday, October 24, 2017 9:48 AM
Subject: Re: Fw: Refinance Capital Appreciation Bonds - Link Update

Hi Hari,

Attached is the power point our Financial Advisor, Blake Boehm, presented to the Board on 10/11/17. I copied him here as well.

Below is the link to our agenda item for Wednesday. If the hyperlink doesn't work, please check Board item VII. C. CAB Refinancing.

<https://agendaonline.net/public/Meeting.aspx?AgencyID=1241&MeetingID=53775&AgencyTypeID=1&IsArchived=False>

This item is pretty comprehensive.

Please let me know if you have any additional questions.
Song

On Mon, Oct 23, 2017 at 8:44 PM, Titan, Hari <hstitan@yahoo.com> wrote:

Hi Song,

Do you have documents with more details on the options including specifics of which Series is being considered for refunding? **Please see Board agenda item for tomorrow night.**

Is it Series E of the 2006 Election? **Yes**

My docs on CABs vs CIBs are all online here: <http://harititan.com/search/node/CAB>

I'd like to have all the consequences of early redemption spelled out for the public (e.g. fees / penalties charged and impact to bonding capacity).

Thanks for your help.

Hari Titan

Safely Reopening Schools

Science Based Risk Assessment for Piedmont

From: Titan, Hari (hstitan@yahoo.com)
To: schoolboard@piedmont.k12.ca.us
Cc: gkessler@piedmont.k12.ca.us
Bcc: nurses@piedmont.k12.ca.us
Date: Thursday, July 16, 2020 at 12:29 PM PDT

Dear School Board and stakeholders,

I'd like to share my thoughts on your interest in going to a 100% distance learning model, following suit of Oakland Unified and other nearby school districts.

I think it is essential for the board to do what's best for Piedmont and base decisions on local prevalence rates.

City / Jurisdiction	Case Rates Per 100,000 population	Positive Cases
Albany	117.4	23
Dublin	134.9	88
Piedmont	156.1	18
Alameda, City of	166	133
Fremont	185.2	435
Pleasanton	209.1	170
Berkeley LHJ	233.6	291
Emeryville	316.6	38
Union City	348.9	264
Livermore	365.4	336
Castro Valley MAC	375.4	245
Newark	433	213
San Leandro	472.9	429
Fairview MAC	699.3	75
Eden Area MAC	734.8	508
Oakland	745.4	3259
Hayward	802.4	1292
Under Investigation		444
Alameda County	502.9	8478

Piedmont, Alameda County
→ **3rd lowest prevalence**
→ **Prevalence more like Dublin than Oakland**
→ **18 cases, as of 7/16/20**

Piedmont population ~ 11,530

Hospitalizations and Deaths are not reported by City / Jurisdiction but Skilled Nursing Facility (SNF) deaths are separated out

The majority of deaths are in SNF. Teachers are not in SNF.

Alameda County Skilled Nursing Facilities
COVID-19 Dashboard Updated 7/10/2020 with data from CDPH through 7/8/2020

Despite the increased concern around Piedmonters not wearing masks, our positive cases rates went from 13 a month ago to 18 today.

Local officials have been opening up different aspects of local businesses and knew an uptick in cases was bound to occur. County health officers also instituted free testing in high-risk areas which are definitively going to increase case counts by capturing more asymptomatic positives than ever before. Dr. Rutherford mentioned one such facility in Fruitvale.

Hospitals also got an uptick in beds being used but not much of an uptick in ICUs.

Governor Newsom noticed the mistake in opening up certain aspects of our local economy, namely indoor dining and bars. On July 13th he instituted an order to reverse course and close down bars and indoor dining options.

Identifying a mistake and undoing it is the right course of action and the governor took that course of action.

Jumping to the conclusion that schools should not reopen is not scientifically warranted. Retail business and air travel brings people much closer together and is riskier than schools with well-regulated mask use and socially distanced desks and hygiene.

Neither Dr. Rutherford nor Dr. Erica Pan is backing a decision to switch to 100% distance learning. The CDC recommends local jurisdictions decide based on their prevalence rates. In the

June 24 meeting, Dr. Rutherford explained the causes behind the spikes and should be reinvited for an update.

I heard something about Piedmont high schoolers possibly testing positive after vacationing in Tahoe. This report is well in advance of 14-days prior to school opening.

I have not seen a summary of scientific facts or any work product from the Health and Safety committee. This is part of a pattern in the district to avoid tracking data, metrics, science, research, and analysis. As a result, I took it upon myself to create a science-based risk assessment, see attached.

Parents I've spoken to are very upset with this turn of events. They are seeking transparency and consistency that comes from a solid grounding in scientific facts and experts whose day job is to study them.

Without expert-led scientific facts and metrics, school policy will flip flop in the wind of the daily news cycle.

Superintendent Booker and the School Board should explain:

1. Why just a few weeks ago he said AB77 precludes 100% Distance learning.
2. If AB77 was modified somehow, what was the school board's position on those changes?
3. Has the teacher's union threatened to strike?
4. Will accommodations are being made for the teachers who refuse to teach in class? How many teachers are there in this category?
5. Does the school board have letters recommending a switch to 100% DL from a society of pediatricians or a local epidemiologist?
6. How is closing school sites the appropriate response to the fact that reopening retail, travel, and manufacturing parts of the economy caused the spike?
7. If the motivation for this change is based on recent events, then the Governor's recent decision to roll back indoor dining and bars should be allowed to play itself out.
8. Randy's previous guidance was something like if any student tests positive, that student will be quarantined for 14 days and their classes would get canceled until everyone is tested and all positive cases quarantined. How did we go from a policy of classroom containment to shutting down all school sites?
9. Why does the board need to decide to change the plan today?
10. How can Randy be realistically expected to increase the quality of distance learning on a few day's notice and how can teachers achieve this with a few extra planning days?

I hope you enjoy the attached presentation. If you see anything missing or incorrect, please let me know.

Hari Titan
125 Saint James Drive, Piedmont CA
510.450.0772



Science Based Risk Assessment for PUSD.pdf
2.7MB

Re: Fw: Lead contamination found in water at 7 Oakland schools - SFGate.com

From: Titan, Hari (hstitan@yahoo.com)
To: rbooker@piedmont.k12.ca.us
Cc: seggert@piedmont.k12.ca.us; ppalmer@piedmont.k12.ca.us
Date: Thursday, November 2, 2017 at 01:32 PM PDT

Hi Randy and Pete,

Thank you for your diligent action on this matter.

Hari

From: Randall Booker <rbooker@piedmont.k12.ca.us>
To: "Titan, Hari" <hstitan@yahoo.com>
Cc: Sylvia Eggert <seggert@piedmont.k12.ca.us>; Pete Palmer <ppalmer@piedmont.k12.ca.us>
Sent: Thursday, November 2, 2017 1:24 PM
Subject: Re: Fw: Lead contamination found in water at 7 Oakland schools - SFGate.com

Hi Hari-

Thanks for checking-in. I forwarded your email thread to our Director of Facilities, Pete Palmer. His response is below. Thanks again,

Rb

Hi Randy,

Refer to my correspondence with EBMUD on Tuesday, 10/17/17 below. We are in the process of scheduling lead testing at every PUSD campus via a free program sponsored by EBMUD. We will be submitting our application to EBMUD this week, we will then have an idea as to when the testing will occur. I will forward the test results as soon as we receive them. I am the PUSD designee that will request/oversee the water testing at each campus.

As a PUSD policy, every time we install a new drinking fountain we have a licensed hygienist test for lead after it has been installed. None of the tests we have conducted have resulted in elevated lead levels.

Regards,

*Pete Palmer
PUSD, Director of Facilities*

----- Forwarded message -----

From: [Ramos, Javier <javier.ramos@ebmud.com>](mailto:javier.ramos@ebmud.com)
Date: Tue, Oct 17, 2017 at 12:35 PM
Subject: PUSD Lead in School Sampling Program
To: "ppalmer@piedmont.k12.ca.us" <ppalmer@piedmont.k12.ca.us>

Good Afternoon Pete,

It was a pleasure speaking with you today. Included below are links to:

- The template letter which should be used to make the request for lead sampling at the PUSD schools*
- The addressee it should be sent to*
- And the website created by the state to help school districts navigate through the process.*

As instructed by the state the superintendent or designee of a school must submit a written request to the public water system that serves water to the school where lead sampling is being requested. DDW has created a [template letter](#) to make the request for sampling. The superintendent must provide written authorization to EBMUD for a designee to request lead testing. The designee is any authorized school personnel designated in writing by the superintendent, such as an environmental health manager or principal.

Lead in Schools

The addressee for the template letter is:

*Brett Kawakami
Engineering Manager*

EBMUD
375 11th Street
Oakland, CA 94607

In the meantime feel free to give me a call to begin discussing how your school district can be prepared for lead sampling day.

Until then,

Javier Ramos
Water Distribution Supervisor

Randall Booker
Superintendent

Piedmont Unified School District
760 Magnolia Avenue
Piedmont, CA 94611
510.594.2614 office
www.piedmont.k12.ca.us
<https://www.twitter.com/piedmontunified>
<https://www.instagram.com/piedmontunified>

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On Tue, Oct 31, 2017 at 4:07 PM, Titan, Hari <hstitan@yahoo.com> wrote:

Hi Randy,

FYI, see questions in email thread below regarding the type and age of the plumbing in the middle school and when is PUSD planning on conducting lead testing.

I suspect your answers might appeal to the broader community. Feel free to respond publicly.

Hari

----- Forwarded Message -----

From: Roopal Desai <doctaroop@gmail.com>
To: "Titan, Hari" <hstitan@yahoo.com>
Cc: Annemarie Nicoll <annemarie.nicoll@gmail.com>; Suzie Skugstad <suzie@hsdesigneb.com>
Sent: Saturday, October 28, 2017 11:15 AM
Subject: Re: Lead contamination found in water at 7 Oakland schools - SFGate.com

Hi, Annemarie. The middle school has at least one water filter (near the cafeteria) similar to the ones in some airports, in addition to water fountains.

On Oct 28, 2017, at 10:50 AM, Titan, Hari <hstitan@yahoo.com> wrote:

Hi Annemarie,

It seems we went through lead testing at a state level in 2012. Piedmont zip codes (e.g. 94610 and 94611) did not have high lead levels for under school age children (age < 6):

[Data](#)

Data

I was looking for the same level of information for school age children and didn't see those results on that government website. School age children results got rolled up to a Health district level which could be either the city (not Piedmont) or county (Alameda!). Furthermore these results measure lead poisoning which could come from non-school water sources.

It seems with the Governor's recently passed mandate we will get a deeper inspection of school facilities. I'm sure Randy is aware of this mandate but we could push for an inspection earlier than 2019.

One of the benefits of rebuilding school facilities is that we get new plumbing and fixtures that are compliant with the latest building codes. Currently that means copper pipes joined with lead-free solder. Older buildings may have corroding galvanized steel pipes or copper with leaded solder.

I also checked PUSD's Facilities Assessment document which was drafted before Measure H1 to help identify what upgrades are needed in the district: [PUSD Facilities Assessment 2015-12-07.pdf](#)



PUSD Facilities Assessment 2015-12-07.pdf

That document mentions plumbing code once in the document in reference to the Middle school. All other references to plumbing don't mention the age of the plumbing. That might be another question for Randy.

Hari

From: Annemarie Nicoll <annemarie.nicoll@gmail.com>
To: Suzie Skugstad <suzie@hsdesigneb.com>; Hari Titan <hstitan@yahoo.com>
Sent: Friday, October 27, 2017 1:09 PM
Subject: Lead contamination found in water at 7 Oakland schools - [SFGate.com](#)

do either of you know if the Piedmont have been teated for lead?

<http://m.sfgate.com/bayarea/article/Lead-contamination- found-in-water-at-7-Oakland-12310183.php>

Sent from my iPhone

Transparency of initial bargaining proposals - Government Code 3547

From: Titan, Hari (hstitan@yahoo.com)
To: rbooker@piedmont.k12.ca.us; cwozniak@piedmont.k12.ca.us
Cc: schoolboard@piedmont.k12.ca.us
Date: Thursday, March 18, 2021 at 09:06 AM PDT

Dear Cheryl Wozniak and Superintendent Booker,

[Ed-data.org](#) very briefly summarized Government Code 3547 as the “sunshine” clause of the Educational Employment Relations Act (EERA, aka Rodda Act) that requires that each party’s initial bargaining proposal be presented for public comment at a publicized school board meeting.



Negotiating Teachers' Contracts in California
This article provides a brief look at how contracts are negotiated for K-12 public school teachers in California...

The actual text of [Government Code 3547](#) reads very consistent with the summary provided by Ed-data, is as follows (highlighting added by me):

3547.

- (a) *All initial proposals of exclusive representatives and of public school employers, which relate to matters within the scope of representation, shall be presented at a public meeting of the public school employer and thereafter shall be public records.*
- (b) *Meeting and negotiating shall not take place on any proposal until a reasonable time has elapsed after the submission of the proposal to enable the public to become informed and the public has the opportunity to express itself regarding the proposal at a meeting of the public school employer.*
- (c) *After the public has had the opportunity to express itself, the public school employer shall, at a meeting which is open to the public, adopt its initial proposal.*
- (d) *New subjects of meeting and negotiating arising after the presentation of initial proposals shall be made public within 24 hours. If a vote is taken on such subject by the public school employer, the vote thereon by each member voting shall also be made public within 24 hours.*
- (e) *The board may adopt regulations for the purpose of implementing this section, which are consistent with the intent of the section; namely that the public be informed of the issues that are being negotiated upon and have full opportunity to express their views on the issues to the public school employer, and to know of the positions of their elected representatives.*

In my experience of school board meetings over the past year, I do not recall any example of PUSD disclosing their initial proposal along with the APT / CSEA unions disclosing their initial proposal for public review followed by the adoption of the initial PUSD proposal by the school board or any 24 hour period for adjustments to that proposal.

I also couldn't find any PUSD school board regulation for the purpose of implementing this sunshine clause of the EERA as suggested by Government Code 3547 (e). I found [board bylaw 9321](#) that talks about the Rodda Act but completely ignores the sunshine clause G.C. 3547.

Independent law firm Dennis Woliver Kelley has a [Brown Act primer](#) that covers G.C. 3547, see page 38 of the attached PDF. It says, "*The EERA requires all initial negotiation proposals of the union and agency to "be presented at a public meeting of the public school employer." Negotiations may not commence until the public has had an opportunity to review and comment on the proposals, and the proposals are formally received (union proposal) and adopted (agency proposal) by a board. This is referred to as the "sunshining process."*"

Fremont Unified School District appears to be following the spirit of Government Code 3547, see Negotiations Updates link [here](#).

I would say the spirit of Government Code 3547 is not being followed in PUSD.

If Fremont Unified is able to provide this level of transparency, why doesn't Piedmont Unified?

Thank you.

Hari Titan, Ph.D.



DWK_Brown_Act_Manual_2019.pdf

6.3MB

PUSD Outdoor Instruction

From: Titan, Hari (hstitan@yahoo.com)
To: rbooker@piedmont.k12.ca.us; schoolboard@piedmont.k12.ca.us
Cc: brettdbyers@gmail.com; gruberad@gmail.com; christinamaybaum@gmail.com; cass@qcommunications.net
Date: Wednesday, March 3, 2021 at 04:58 PM PST

Dear School Board and Superintendent Booker,

From your last email, it was clear Dr. Moss (ACPHD) still requires that PUSD students maintain a 6-foot social distance. We expect ACPHD to eventually reduce their 6-foot social distancing mandate to a 4-foot or 3-foot mandate. Apparently, [Tamalpais Union High School in Marin County](#) has reduced to a 4-foot mandate, see slide 13. We just don't know when that would happen here and don't want further delays when it does happen.

We hope the school board decides to remove the 6-foot social distancing requirement from the ["reopening of schools plan" motions passed last summer](#) that impacts the 2020-21 school year. If this requires negotiation with the teacher's union or other internal advisors that process should be started right away.

The purpose of removing all 6-foot language in PUSD motions, resolutions, and MOUs would be to make the Alameda County Public Health Department (ACPHD) and the California Department of Public Health (CDPH) the exclusive regulating bodies on social distancing and maximum cohort sizes. This action would place you in a state of readiness for when these regulating bodies reduce the minimum distance between student desks.

We also cannot count on ACPHD to reduce their social distancing requirement in time for the 2021-22 school year. Instead of hoping for the best, we should plan for the worst-case scenario. If the ACPHD mandate remains at 6-feet or if the social distancing mandate goes down to 4-feet and there aren't enough classrooms large enough to accommodate all students, many parents are seeking a backup plan for full reopening in the fall that would still work.

In my email last week I suggested keeping all three options on the table (distance learning, 100% full-time and hybrid) in order to reduce the number of students that require in-person instruction and thereby increase the likelihood of accommodating the ~200 families that are threatening to leave Piedmont schools with 100% full-time in-person instruction.

Other parents are thinking about additional classroom spaces that utilize school grounds and other large indoor spaces as a way to achieve similar goals. Last summer I contacted board members Cory Smegal and Megan Pillsbury to inquire about outdoor education options and find out what the school district had looked at in that regard. I could not obtain any document from PUSD that explored this topic at that time.

I decided to expand my safety presentation with visual analysis for all school sites in Piedmont, see slides (pages) 31-43 in my [Safety Summit Primer](#). Local attorney and venture capitalist, Brett Byers, looked into California Environmental Quality regulations and provided his analysis to the parent group and the school district. I added a slide summarizing Brett's CEQA analysis in my presentation.

I submitted my Safety Summit Primer to the school board and got no positive traction at that time. Later I got an indirect message that the state superintendent of public instruction (Tony Thurmond) did not want to provide the necessary waivers for outdoor K-12 instruction.

We are aware that PUSD and the school board are looking into field science programs along the lines of what other school districts listed here: [California Outdoor Schools Association - Science \(CA Dept of Education\)](#) have done. Just to be clear, we are not focused on special subjects of study where outdoor education is an ideal locale for learning. We are seeking venues that can house entire classes (e.g. core classes) for K-12 instruction with 6' social distancing.

The [COVID-19 School Guidance / COVID-19 School Guidance: Alameda County School Reopening Plans](#) mentions outdoor instruction only in situations where indoor ventilation cannot be upgraded: "If not able to properly ventilate indoor instructional spaces, outdoor instruction is preferred", see page 19. The

document also recommends outdoor settings for band, choir, and food services. The document does not clearly spell out what regulation or regulator (elected or not) has authority overuse of outdoor instructional spaces.

We are aware of various school districts using tents for food service purposes and also to quarantine suspected positive Covid-19 cases prior to being picked up by their family.

Outdoor instruction in tents has been an idea that has been kicked around in the media over the past 9 months. I'm one of many Piedmont parents who have inquired about this option with the school district over the past 9 months. In a local Facebook page managed by Laura Maestrelli, we have not found any Piedmont parents who definitively know the answers to our questions listed below.

We are also aware that Superintendent Booker keeps a close eye on all possibilities for a return to full-time instruction and has made multiple commitments to finding a way to return to full-time education in Piedmont.

In addition, we are aware that Superintendent Booker attends meetings with his peer superintendents across the Bay Area and beyond. We believe parents across the Bay Area have been asking their superintendents this same question. Our questions below should not be surprising. We expect Superintendent Booker to be knowledgeable on this topic.

Questions for Superintendent Booker and the School Board:

1. Are you aware of any public school districts employing outdoor instruction for full-time K-12 education?
2. Can you describe the legal blockers, if any, housing outdoor tents or portable classrooms for full-time K-12 instruction?
3. Do you know the agency (e.g. ACOE, CDE, ACPHD, CDPH) that regulates the use of outdoor tents or portable classrooms on school grounds?
4. If you don't know the legal status of this scenario, can you find out from other superintendents or from the regulatory agencies above or from Alameda County counsel?
5. If the superintendent needs School Board approval to investigate the legality and limitations of using outdoor tents or portable classrooms for full-time K12 instruction, will the School Board provide that direction?
6. Does PUSD have any document that explores classroom capacities with various social distancing requirements or outdoor spaces that can be utilized? If so, please share such document(s).
7. Is it legal to hold K-12 classes in an off-campus commercial building that has the appropriate MERV-13 filtration?

If these questions can't be answered or more context is needed, we the undersigned would like to schedule a Zoom call to discuss.

Sincerely,

Hari Titan
Alicia Kalamas
Brett Byers
Christina Maybaum
Cass Caulfield

To add vaccine mandate to MOU negotiation

From: Titan, Hari (hstitan@yahoo.com)
To: rbooker@piedmont.k12.ca.us
Cc: seggert@piedmont.k12.ca.us
Date: Thursday, October 28, 2021 at 02:49 PM PDT

Hi Randy,

Hope you are well.

I just read the latest MOU with the union and noticed you have another negotiation session coming up.

The union agreement to follow guidance from ACPHD and CDPH appears to be a step forward.

What's really missing is a written agreement to abide by mandates issued by our school board, specifically the vaccine mandate from the last board meeting.

The union president verbally agreed to the mandate when it had a personal belief exemption so that really doesn't count and having an agreement in writing is much better than verbal anyway.

Also, the board mandate has no penalty for non-compliance for the highest hospitalization/mortality risk group in the school district so a written agreement would allow for penalties to be decided upon later.

It would have been nice if the board requested to negotiate their mandates for the written MOU but I didn't see that mentioned specifically in the interests sunshined.

Is it too late to add the vaccine mandate to the negotiation?

Thanks for your consideration.

Hari Titan

----- Forwarded Message -----

From: Sylvia Eggert <seggert@piedmont.k12.ca.us>
To: Titan, Hari <hstitan@yahoo.com>
Sent: Sunday, October 24, 2021, 07:45:59 PM PDT
Subject: Re: PUSD Board of Education Agenda - October 27, 2021

Hi Hari

Nice to hear from you. The TA will be posted as soon as APT membership has a chance to vote. Voting will close on Tuesday. The 2021-22 negotiations were sunshined at the Sept. 22 (1st reading) and Oct. 13 (2nd reading) meetings.

Let me know if you need more information.

Sent from my iPhone

On Oct 24, 2021, at 6:18 PM, Titan, Hari <hstitan@yahoo.com> wrote:

Hi Sylvia,

Thanks for making the link to the public page more direct.

I noticed there is a line item for:

Approve 2021-22 Tentative Agreement between the Association of Piedmont Teachers (APT) and Piedmont USD

However there is no link to the actual tentative agreement.

Could you attach the link or email me the tentative agreement?

When was the last sunshine clause of the Rodda Act for these negotiations?

Thanks.

Hari

On Sunday, October 24, 2021, 11:07:55 AM PDT, Sylvia Eggert <seggert@piedmont.k12.ca.us> wrote:

The agenda for the October 27th PUSD Board of Education meeting has been posted to the District's Gamut Public [Page](#).

The meeting will be held in-person and via Zoom. The Zoom link can be found on the agenda, as well as on the District website under the Board Meeting Schedule Page and the District Calendar.

--
Sylvia Flores Eggert

Executive Assistant to
the Superintendent and Board of Education
Piedmont Unified School District

Pronouns: She/Ella

510.594.2614
510.654.7374 (fax)



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Brainstorm: Reopen Schools In-class 5-days-per-week

Submitted by [Hari Titan](#) on Sat, 07/04/2020 - 12:17pm

SUNDAY MEETINGS

Hari Titan is inviting you to a scheduled Zoom meeting.

Topic: Brainstorm: Reopen Schools Full-time In-class 5-days-per-week

Time: Jun 28, 2020 07:00 PM Pacific Time (US and Canada)

Every week on Sun, until Aug 9, 2020, 7 occurrence(s)

Jun 28, 2020 07:00 PM

Jul 5, 2020 07:00 PM

Jul 12, 2020 07:00 PM

Jul 19, 2020 07:00 PM

Jul 26, 2020 07:00 PM

Aug 2, 2020 07:00 PM

Aug 9, 2020 07:00 PM

Please download and import the following iCalendar (.ics) files to your calendar system.

Weekly: https://zoom.us/meeting/Jcrfu-vrTsiGt3AAOPgBtfWupjmd_RFSb3S/ics?icsToke...

Join Zoom Meeting

<https://zoom.us/j/93696730809?pwd=UmdEd2IzbXpPc0JpN1ZERWJUbFRRQT09>

Meeting ID: 936 9673 0809

Password: 7UBh5D

WEDNESDAY MEETINGS

Hari Titan is inviting you to a scheduled Zoom meeting.

Topic: Brainstorm: Reopen Schools Full-time In-class 5-days-per-week

Time: Jul 1, 2020 05:00 PM Pacific Time (US and Canada)

Every week on Wed, until Aug 5, 2020, 6 occurrence(s)

Jul 1, 2020 05:00 PM

Jul 8, 2020 05:00 PM

Jul 15, 2020 05:00 PM

Jul 22, 2020 05:00 PM

Jul 29, 2020 05:00 PM

Aug 5, 2020 05:00 PM

Please download and import the following iCalendar (.ics) files to your calendar system.

Weekly: https://zoom.us/meeting/tJYkf-yopzktH9aVJ_N9uluadRoRS43eAZRT/ics?icsToke..."

Join Zoom Meeting

<https://zoom.us/j/92985092752?pwd=SXUwQmp2Ny9zdURFYmlpVmxnNTdOZz09>

Meeting ID: 929 8509 2752

Password: 7UBh5D

Tags:

- [curriculum](#)

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Classroom Instruction

Submitted by [Hari Titan](#) on Sat, 08/15/2020 - 3:17pm

Piedmont Unified is in DISTANCE LEARNING until further notice. Distance learning worsens educational inequalities and students are estimated to lose months of learning which could harm an entire generation.

What happens when Alameda County satisfies the Governor's criteria and the school board regains autonomy? This question should be answered by all candidates for our school board.

On June 24th Dr. Rutherford attended our school board meeting as an epidemiologist familiar with Piedmont and our schools. I was thrilled because I knew he had the right expertise having published a scientific paper on reducing hospitalizations working closely with epidemiologists. Rutherford testified that with precautions including masks and social distancing it is next to impossible for a student to infect a teacher and that student infections rarely result in complications requiring hospitalization.

The school district took Dr. Rutherford's advice and crafted a hybrid option to allow parents to choose 50% classroom instruction or 100% distance learning. The hybrid option required daily clearances prior to student and staff participation, daily deep cleanings, frequent air changes per hour within all classrooms, and many other precautions.

The majority of parents were convinced regarding the safety of this modified classroom instruction and that majority persists in my recent survey as well as a Gallup survey of parents nationwide. An even larger percentage of parents were happy with having the choice

of learning options. It was not a matter of either distance or hybrid learning but a choice based on risk assessments by individual households as the CDC recommends.

Despite the success with parents, teacher-endorsed board members and many teachers remained unconvinced that the precautions being taken would withstand the testing and hospitalization surges. Having a range of increasingly stricter precautions would allow classroom instruction to continue during unplanned hospitalization rate surges. A public summit with experts like Dr. Rutherford, teachers, and board members would allow the school district to find base implement additional precautions to address their concerns.

Days before the Governor put our county on a watchlist and during a closed session our school board ordered a distance learning plan for all students. They did not follow prior criteria for closing schools or specify criteria for resuming the hybrid option or reveal what transpired behind closed doors. Why were classrooms closed before higher-risk segments of the economy were? Dr. Rutherford was not consulted about this change in direction. This action was the opposite of following policies crafted by scientific research and approved by local epidemiologists.

Full-disclosure transparency behind decisions that impact all students reaching their potential is of the utmost importance. The school board should use its legal autonomy to maximize the safety and achievement of every student in Piedmont.

Tags:

- [Distance Learning](#)

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Epidemiologists should lead the way

Submitted by [Hari Titan](#) on Tue, 08/04/2020 - 3:00pm

On March 13, 2020, our school board decided to close schools against the advice of then Alameda County Epidemiologist and interim public health director, Dr. Erica Pan. I spoke at the school board meeting about the importance of sharing data and seeking out advice from our county Epidemiologist and following their leadership on these matters. I did not want science to be politicized by people who were not elected to conduct themselves as Epidemiologists. The school board stated they have enough expertise on the board to decide their own school shut down criteria. Criteria which I can't find published anywhere and which are not being publicly shared by the Health and Safety Committee or its members.

I did not know about Dr. Pan's position against school closures on March 13, but I found her letter from a Public Records Act request 6 weeks later. In a March 13 letter to county superintendents, [Dr. Pan stated:](#)

"The most recent CDC guidance that early short to medium closures do not impact the pandemic Epi curve of COVID-19, and that priority and focus should be given to other mitigation efforts such as improved hygiene, cancellations of non-essential mass gatherings, and other social distancing measures. Countries that have closed schools have not had more success in reducing the spread of disease compared to those that did not. Collectively we need to also balance the impact of school dismissals that disrupt educational continuity and may decrease vital social services that students and families rely upon and have a significant workforce impact."

Independently my email to the school board on March 13 also stated a number of the points made by Dr. Pan and in that same public records act request, I also discovered other physicians emailing the board to not close schools. I felt that my fears of science being politicized were becoming true even at our local school level.

On March 16, 2020, the Alameda County public health department issued its first broad-based shelter-in-place order that shut down all non-essential businesses in a then successful attempt to flatten the rise of hospitalization rates.

On June 24, Piedmont's resident Epidemiologist Dr. Rutherford was invited to speak at a school board meeting. Based on his state-wide contact tracing experience he presented many facts that schools can and should reopen. Soon afterward the school board decided the new school year would open by giving elementary school parents a choice of 100% distance learning (DL) or a half-capacity hybrid DL model that required masks and 6-foot social distancing.

On July 13th the school board met in closed session and asked the superintendent to present plans for 100% DL instead. At a special meeting on July 16th, the board approved the new 100% DL plan citing future lockdowns expected by Dr. Fauci and framing the debate as, "how many teacher deaths would be too many"? A day later our Governor ordered all schools in Alameda County closed until they met certain published criteria. The school board later confirmed that even if the Governor lifted his restriction, they are unlikely to lift theirs.

To gauge public opinion, I decided to survey my email list. So far responses to the main question are as follows:

Which instructional settings do you prefer?	# Responses	% Responses
Reopen schools at full capacity but with masks and a 3-foot separation:	26	22
Reopen schools at half capacity with masks and a 6-foot separation:	56	49
100% Distance Learning:	33	29

The 29% of respondents who prefer 100% DL appears to have increased from when the school district last did their survey. Even allowing for a hypothetical +/- 20% margin of error, it appears a majority of parents are not happy with reopening the 2020-21 school year exclusively in 100% DL mode for all students.

For responses to other questions, see an earlier snapshot here: <https://harititan.com/article/reopening-survey-results>

Tags:

- [Distance Learning](#)

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Hari Titan

5 years ago edited

Gallup just did a national poll comparing reopening schools at full capacity vs 100% distance learning.

Nationally Gallup got 28% for 100% distance learning which is awfully close to the 29% I got for Piedmont.

Nationally Gallup got 36% for full-time in-person instruction which is higher than the 22% I got for Piedmont. This makes sense to me since the governor has ordered 100% distance learning.

Nationally Gallup got 36% for part-time (half-capacity) in-person instruction which is correspondingly lower than the 49% I got for Piedmont.

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Distance Learning makes a comeback in PUSD

Submitted by [Hari Titan](#) on Mon, 09/14/2020 - 2:45pm

At the September 9 school board meeting, Dr. Cheryl Wozniak, Assistant Superintendent, Educational Services gave a presentation on a recent survey to students, parents, and staff regarding distance learning (DL) experiences during the first three weeks of instruction. Some 700 parents, 327 middle and high school students, and 134 staff (paraprofessionals, teachers, and specialists) participated in this survey.

Half of the parents reported an overall positive sentiment with another 8% reporting overwhelmingly positive experience with DL. The percentages for staff were similar. However, these numbers were lower for middle and high school students with 36% reporting overall positive, and another 2% overwhelmingly positive experiences. Nearly 4 out of 10 students reported a mixed or overall neutral experience with DL and 5-6% of parents and students reported overwhelmingly negative experiences with DL.

Parents were asked more descriptors for DL and nearly a third of parents felt DL was more manageable than they had anticipated, another 22% felt DL was going surprisingly well and another 24% felt DL was challenging but believe it will get better. A significant 22% of parents felt that DL was extremely challenging and unsustainable.

Distance learning can be broken down into two major categories, asynchronous learning, and synchronous learning. Synchronous learning refers to students learning together over video calls and asynchronous learning is akin to independent learning using recorded video or homework reading and assignments. Parents were participating in both types of learning with 54% of parents involved in their

child's asynchronous learning most of the time and another 23% involved some of the time. Likewise for synchronous learning, 74% of parents participated most of the time, and another 14% some of the time.

Dr. Wozniak reported positive attitudes from elementary school children who are happy to log on and see their teachers and classmates each day. Middle and high school students are reporting better-organized instruction, a more predictable schedule, and learning a lot more than last spring.

This is a major win for the school district negotiating with teachers and parents to dramatically improve the experience of distance learning. Families are putting in a lot of time to support their students in distance learning and it is easy to wonder how sustainable this will be going forward.

This survey was not meant to measure learning loss compared to previous years as that will take a lot more time and analysis. The district is currently reviewing vendors who test for learning loss. An individual student's measured learning loss will not be shared with parents or students but will be shared with teachers and administrators for planning purposes.

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- [Distance Learning](#)

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Board waivers before applying for a waiver

Submitted by [Hari Titan](#) on Tue, 09/29/2020 - 2:36pm

On September 24, our school board authorized superintendent Booker to begin the process of applying for a waiver for elementary schools to reopen with a hybrid learning model, as laid out by the Alameda County Public Health Department (ACPHD).

The vote was split 3-2 on the board. I haven't seen such a close vote in years. Almost all votes on the school board are 5-0. Voting NO were Andrea Swenson and Megan Pillsbury. At one point in the evening, a board member requested to abstain from the vote which would have left the vote count at 2-2. Board president Amal Smith then jumped in and insisted a full vote count is required that led to the final 3-2 vote.

Superintendent Booker had initially recommended against going for this waiver. Booker stated that based on his conversations with other school districts, many initially indicated interest but none have applied for a waiver citing concerns over negotiations with labor, meeting requirements for student cohorts, and that COVID testing of staff is a "big-big" issue. Booker said our AM/PM student cohorts should qualify.

Booker also stated that applying for a waiver would take resources away from his work on getting special education students back on campus. He said the teachers union agreed to an assessment for special education students but more work is needed for a return to classroom instruction for special education, acute learners, English-language learners, foster youth, and so on. Booker clarified that

collective bargaining with the teachers union would get these kids back into the classroom faster than waiting for the elementary school waiver to be approved.

Later in the meeting, Booker gave an indication of how difficult negotiations had been around classroom instruction. At 1 hour and 42 minutes into the meeting, Booker said that Gabe Kessler, President of the Association of Piedmont Teachers (APT) union had publicly stated: "if it is not safe for all, it is not safe for some". This statement seems contradictory since APT already agreed to parental choice between 100% distance learning and the AM/PM hybrid model splits the classroom into two study groups because it was deemed not safe for all students to be in the classroom. APT has also used CDC criteria to define teachers at increased risk of hospitalization, the same outcome we have been trying to flatten the curve for. Do we need a "safety summit"?

Earlier that evening, Kessler explained he was having difficulty explaining to parents why school district negotiations with APT have been ongoing for nearly 6 months. APT had not endorsed any board candidate in Piedmont prior to 2018. In 2018 APT endorsed Amal Smith and Megan Pillsbury. This year APT endorsed Jason Kelley and Veronica Thigpen.

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CAHOOTS alternative to Police in Schools

Submitted by [Hari Titan](#) on Sat, 04/24/2021 - 9:33pm

Who should have the most say on policing in schools?

1. Students most affected by this regulation?
2. Parents who enrolled their students in PUSD?
3. Teachers and staff, who work at PUSD?
4. The Piedmont community at large?

I feel PUSD school board meetings are the right forum for discussion and debate on this.

The idea of a dedicated police officer was first proposed by the PUSD administration and discussed at the February 27th, 2019 school board meeting, see Randy Booker's report [HERE](#) (will download).

In that report, Superintendent Booker was advocating for an expansion of the roles for policing on school grounds as stated on page 3:

This position looks to partner with school staff to:

1. improve student engagement and connectedness to caring adults,

2. develop substance abuse prevention strategies/programs, and
3. support students in their mental and physical health.

The four main duties are: one of a **counselor** by talking with students and staff and offering guidance and assistance; one of **teacher** by providing classroom presentations, supporting on-campus intervention through discussions and lessons, staff development and informational sessions for parents; one of social worker by linking students, parents and staff with resources and services; lastly, as a **law enforcement professional**. (**Emphasis added**)

Only activities in the law enforcement professional category may require an armed officer. It is rare a student is armed and none have been arrested.

Another stated program goal and outcomes was: “Redefine student’s ideas of Law Enforcement (usually negative) to reflect highly upon PPD and Law Enforcement in general... Strengthening transparency, partnership, and trust with the police that go beyond the school environment.” Is it the job of PUSD to support other governmental institutions, especially when they are currently under a lot of political debate? For example removing police from schools has been a key demand of the Black Lives Matter movement for years, see:

Why Black Lives Matter Wants Police Out Of Schools

Page 5 of Booker’s report also has links to a survey sent to parents, students, and staff. The pie charts in the summary of survey respondents showed that 61% of parents and 70% of middle and high school students thought the SRO position was not needed and 68% of parents and 80% of those students felt the SRO position would set the wrong tone for students. A minority of staff shared the same views with 28%-30% being indifferent or neutral on these issues. Clearly the issue is under debate in PUSD as well.

When examining the raw comments from parents and students (also linked on page 5), those in favor often cited the SRO acting as a deterrent to crime and those against it concerned by the conflicting roles of a police officer and counselor or social worker and many stating a dislike for an armed officer. The raw comments for staff echoed the same sentiments but seemed more polarized with many saying an SRO would “help avoid issues” and “deter violence” and almost as many saying the opposite and echoing concerns with “role confusion”, “not being an effective deterrent” as well as “setting the wrong tone for students.”

During the school board discussion in February 2019, the school board did recognize community opposition to an armed officer. The school board voted the SRO proposal down 4-1.

In May of 2019, City Council took over the grant application and reached a compromise to change the SRO position to a then part-time Juvenile Officer (JO) position. According to a conversation I had with Chief Bowers last year, the Juvenile Officer does conduct periodic patrols around the perimeters of the campuses but will generally only respond on campus if called by PUSD staff. Chief Bowers also explained that he does not have any unarmed officers and the JO position has to be armed as well.

The conversion to an off-campus JO position does not appear to address many of the core concerns that parents, students and staff had regarding “role confusion”, “setting the wrong tone”, and “being armed”. Converting the JO role to a full-time position further exacerbates the issue of expansion of police power on campus.

At the 2020 League of Women Voters school board debate, the moderator asked about a uniformed police officer for the schools, see debate summaries (by the editors of Exedra) [HERE](#). The judgement of school board candidates who were endorsed by at least one City councilmember appears below:

“This is a complicated one,” Cooper said. “I think it goes back to honoring and listening to the children who stood up and said this isn’t something that we want on campus. What I would like to see is a mentor position. Someone who can be there for the kids rather than a uniformed police officer. I would rather have this be part of a Wellness Center program or an outreach where this person is providing advice and guidance to our students rather than looking like some kind of security measure that we put on campus where definitely the BIPOC students did not feel comfortable with that.”

Anderson Thigpen said the focus should be on wellness and using Wellness Center resources to tackle these issues. “These funds [the federal grant for the current juvenile liaison officer position] come from a pot of money that is focused on getting kids to not use tobacco products and smoke. “Recently, the Wellness Center, to address the needs of distance learning and COVID and kids feeling isolated, started lunchtime drop-in appointments.”

Kelley noted that this is part of a broader conversation.“What’s appropriate work for police to be doing and what can be handled better by other professionals with other experiences and other skills,” he said. “I would agree that especially listening to the kids that feel perhaps most vulnerable when uniformed police are around and pushing this toward a wellness-focused position is the way that we should explore go forward.”

Said Smegal, “The whole proposal started out as a more traditional school resource officer which was modified. It kind of went through this evolution. We really tried to reach this compromise in terms of this juvenile liaison officer. We have a strong partnership between the city and the schools in serving the needs of the students. We need to work to expand our mental health capacity. This grant does not really fit that need. And it’s my understanding we won’t be pursuing it again.”

Exedra’s summary of my position missed my request for an unarmed officer which I later learned from Chief Bowers is not possible with a sworn peace officer.

Summarizing, it seems that at the time all candidates wanted something other than an armed officer and many wanted greater consultation with the student body impacted by these decisions, not less. I have since learned that all elected school board members now support renewing the JO position.

Per Sara Lillewand’s April 5th report to City Council, the JO position responded to 103 formal calls for service (resulting in 29 incident reports and no arrests) and handled approximately 200 informal requests for assistance at PUSD locations since July 30, 2019. The PUSD campus was closed for most of this time. In the future with the campus open and the JO position extended to full-time, I would expect the number of formal and informal calls to continue at roughly those levels annually.

Every visit to the PUSD campus by an armed officer impacts multiple students at an emotional level. From those who saw the officer approach from a distance to those students who talk about it afterwards. It doesn’t really matter if the officer begins their journey from the police station or somewhere on campus. My own daughter reported to me each time she heard the JO was on campus in the fall of 2019 and the fact that all her friends were talking about it. She also reported when students would talk about media stories of an officer shooting a student thinking they had a gun when they did not. Students have gone through a lot over this pandemic and expanding police interactions on campus is not a good way forward.

ALTERNATIVES TO AN ARMED POLICE RESPONSE

In conversation with Randy Booker about this issue, I heard the basic complaint that many of these kids who are having a meltdown or bringing drugs or guns to campus are potentially dangerous for the average teacher to deal with. Is there an alternative to an armed response?

[Mental health workers to take lead in some NYC 911 calls](#)

[Oakland may send mental health experts, not police, for some 911 calls](#)

[This town of 170,000 replaced some cops with medics and mental health workers. It's worked for over 30 years](#)

[\\$1 billion for CAHOOTS Act included in American Rescue Plan](#)

Last year Oakland Council members discussed the possibility of launching a pilot called MACRO (the Mobile Assistance Community Responders of Oakland).

The Eugene, OR model of CAHOOTS is being expanded nationwide with funding in the recently passed American Rescue Plan.

I feel the theme of these programs is consistent with the 2020 pre-election positions of most school board candidates. Perhaps they were not aware of these programs when they agreed to back the JO position.

I urge City Council to take this progressive leap forward and examine how to get Piedmont's share of the \$1 billion CAHOOTS Act money and build a non-police force for public wellness.

Sincerely,

Hari Titan

=====

(June 2020) [Governor Newsom weighs in:](#)

"If you're calling for eliminating the police, no. If you're talking about reimagining ... the responsibility that we placed on law enforcement to be social workers and mental health workers and involved in disputes where a badge and a gun are unnecessary, I think absolutely this is an opportunity to look anew at all of the above."

(April 2021) [Police Chief's report](#)

(June 2021) [New 988 number funded and will go into effect in select cities by summer of 2022](#)

(May 2022) [An Assessment of Requests for Police Services in Piedmont, California](#)

(June 2022) [Eliminating Unnecessary Police Interaction In Schools \(SB 1273\)](#)

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School Board Access Survey Results

Submitted by [Hari Titan](#) on Sun, 12/01/2013 - 1:18pm

I conducted a randomized but very small survey of parents in Piedmont.

Results from Q1 show that over 65% of parents are "not very aware" or "totally not aware" of School Board decisions.

Q2 asks how many parents go to source documents like minutes of the meetings and the results suggest 5% tried and found them difficult to navigate and 85% don't go to these source documents!

Combining Q1 and Q2 responses, it appears that 25% of parents are "somewhat aware" or better of School Board decisions without directly going to source documents. That suggests "word of mouth", parent clubs and the local paper is how they are getting that info.

Q3 talks about knowing what the Board is looking at prior to a decision having been made. Results show a slight bump in knowledge (compared to Q1) about what is currently being considered. This also fits my personal experience with parents asking me "What ever happened to ... ? Did the board make a decision on that?"

Q4 gets to the question of whether we can and should improve access to information and make feedback easier. Results indicate that 75% of parents feel this type of access can and should be improved.

Q5 talks about whether parents would actually use an electronic town hall (discussion forums and online polls) if we had one. 30% of parents indicate yes with another 55% undecided. I would take that as a minimum of 30% would use the service. If I built it right and it was easy to use that percent could grow.

Comparing Q5 with Q4 is also interesting. If the 30% is entirely contained in the 75%, that suggests 45% of parents want an easier system for other parents to use if they need it. That is very egalitarian of those parents.

These results are from a Bay Area city which might be biased in favor of technology and responsive government.

The results are really "results suggest" since my sample size was very small.

Below are the raw results

Q1: The School Board makes spending priorities and other key decisions in line with best practices, legal requirements and community wishes. How aware are you about these decisions?

very well aware

5%

well aware

10%

somewhat aware

20%

not very aware

40%

totally not aware

25%

Q2: The School Board posts the agenda, minutes and video of each (approx. 3 hour) meeting online. Do you feel it is difficult to keep up with the School Board proceedings?

yes

5%

no

10%

never tried

85%

Q3: School parent clubs and newspapers help get the word out on major decisions the Board is considering or has made. Other topics are found out by word of mouth. Throughout the year, how aware are you about what the Board is currently considering?

very well aware

5%

well aware

5%

somewhat aware

35%

not very aware

40%

totally not aware

15%

Q4: Is it important for the School Board to make access to information and feedback easier?

yes

75%

no

5%

don't know

20%

Q5: If there was an easier way to keep up with the School Board (e.g. a board member dedicated to facilitate discussion forums and online polls), would you be more involved?

yes

30%

no

15%

don't know

55%



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Leveraging a Town Hall

Submitted by [Hari Titan](#) on Mon, 01/20/2014 - 6:16pm

Leveraging a Town Hall for Capital Improvements

I have spoken at many parents clubs about using an Electronic Town Hall to help the community identify our priorities. For example, I believe that capital improvement projects should be chosen based on actual needs and on creating the most educational benefit to students. Others may feel that the fund-raising community (e.g. the Ed Foundation) is better able to prioritize projects based on what is easiest to get donations for. Projects chosen the latter way have at times polarized the community especially when they barely pass the required minimum 55% of voters.

If parents and educators had a mechanism to directly influence the prioritization of capital improvement projects, we should end up with some projects that are supported by a larger majority of the community. Going forward with these initiatives would not polarize the community. As a long-term strategy the District needs to stay friends with the taxpayers who need to renew the parcel tax in 2020.

The town hall mechanism I am proposing would attract parents to weigh in on issues based on their varied amounts of free time, their interests and knowledge of the topics of the day. If the project is doing well with the first groups of parents who use it, it is more likely to expand and do well with the broader public. And open discussions over time are more likely to give issues time and space to develop, and so are less likely to attract strongly dissenting reactions in the press. The electronic town hall would also create an institutional memory with no issues around "lack of disclosures".

Another way we can leverage this town hall is to help decide on the amount of capital expenditure we'd like to make and the tradeoffs between competing projects. If the School Board has decided on a project to pursue, we can again leverage the same active community to help decide what level of renovation is necessary, what aspects of the renovation are most important, and what type of financing arrangement is best for the community.

Many past candidates for School Board have expressed an interest in greater transparency, greater accountability and more public input. The only way I can see to achieve these goals and be able to manage the volume of communications to and from the School Board is to employ Web 2.0 technologies.

Addendum:

School District creates App for parents to communicate with each other: <http://www.piedmont.k12.ca.us/blog/2015/02/12/announcing-the-pusd-switch...>

Tags:

- [campaign](#)

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 Hari Titan 5 years ago

During the Covid-19 Shelter-in-Place, city council, school board and parent club meetings are now held using Zoom video conferencing that allows public input (typically 2 minutes per speaker). This resulted in record attendance and feedback. Will this continue after the economy completely opens up?

Piedmont Unified also followed the lead of other school districts in utilizing the Thought Exchange(tm) digital town hall discussion forum.

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STEM Ranking

Submitted by [Hari Titan](#) on Fri, 05/23/2014 - 11:57pm

Piedmont High School is ranked #134 in STEM at the national level by the US News and World Report ranking based on students' performance in AP Science and Math classes.

This means there are 133 public high schools in the nation with better STEM outcomes.

Overall Piedmont ranks #200 nationally amongst public high schools so our STEM ranking is actually better than our overall ranking.

The Bay Area High School STEM rankings are as follows [National Rank in brackets]:

1. [#5] (Palo Alto) Henry Gunn High
2. [#7] (San Jose) Lynbrook High
3. [#8] (Cupertino) Monta Vista High
4. [#11] (Saratoga) Saratoga High

Source: <http://www.usnews.com/education/best-high-schools/national-rankings/stem>

5. [#35] (Orinda) Miramonte High

Source: <http://www.usnews.com/education/best-high-schools/national-rankings/stem...>

6. [#52] (San Jose) Leland High
7. [#53] (Larkspur) Redwood High
8. [#69] (Cupertino) Cupertino High
9. [#71] (Los Gatos) Los Gatos High
10. [#74] (Moraga) Campolindo High

Source: <http://www.usnews.com/education/best-high-schools/national-rankings/stem...>

11. [#76] (Pleasanton) Foothill High
12. [#82] (La Fayette) Acalanes High
13. [#85] (Los Altos) Los Altos High
14. [#95] (Fremont) Irvington High

Source: <http://www.usnews.com/education/best-high-schools/national-rankings/stem...>

15. [#116] (Pleasanton) Amador Valley High

Source: <http://www.usnews.com/education/best-high-schools/national-rankings/stem...>

16. [#134] (Piedmont) Piedmont High
17. [#135] (San Ramon) Dougherty Valley High
18. [#139] (Albany) Albany High
19. [#149] (Walnut Creek) Las Lomas High

Source: <http://www.usnews.com/education/best-high-schools/national-rankings/stem...>

I count 15 public schools in the Bay Area that beat Piedmont High in STEM rankings as of 2014.

Note on the STEM ranking methodology:

U.S. News & World Report's STEM rankings methodology was developed based on the key principle that students at the Best High Schools for STEM must participate in and pass a robust curriculum of college-level math and science courses. STEM stands for science, technology, engineering and math. The eligible schools were next judged nationally on their level of math and science participation and success, using Advanced Placement (AP) STEM test data for 2012 graduates as the benchmark to conduct the analysis. The U.S. News Best High Schools for STEM rankings methodology does not rely on any data from the U.S. Department of Education.

AP is a College Board program that offers college-level courses at high schools across the country. College Board defines STEM Math as AP courses in Calculus AB, Calculus BC, Computer Science A, Computer Science AB, and Statistics; and STEM Science as AP courses in Biology, Chemistry, Environmental Science, Physics B, Physics C: Electricity and Magnetism, and Physics C: Mechanics.

Math and science success at the high school level was assessed by computing a STEM Achievement Index for each school that was included in the top 500 of the 2014 Best High Schools rankings, based on the percentage of its 2012 graduates who were AP test-takers who had also taken and passed college-level AP STEM Math and AP STEM Science tests. The higher a high school scored on the STEM Achievement Index, the better it placed in the Best High Schools for STEM rankings.

Addendum (Oct 2016)

We appear to be doing much better in 2016. Here is a link to that: <https://agendaonline.net/public/Meeting.aspx?AgencyID=1241&MeetingID=378...>

Tags:

- [STEM](#)

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6 years ago

Our 2018 US News and World Report rankings have changed significantly since 2014. Our overall ranking appears to have dropped but I don't know if they changed the criteria for which schools are entering their rankings. Our Bay Area STEM rankings appear to be better. In 2014 I saw 15 schools better and now I saw only 12 schools were better:

<https://www.usnews.com/educ...><https://www.usnews.com/educ...>0 0 Reply **Hari Titan**

9 years ago

First online reference to STEM in Piedmont:

<http://www.eastbaytimes.com...>0 0 Reply **Hari Titan**

9 years ago

Some interesting STEM videos:

[see more](#)0 0 Reply **Hari Titan**

9 years ago

Nearly 27k STEM jobs in SF and another 30k STEM jobs in SJ areas:

<http://www.forbes.com/sites...>0 0 Reply [Subscribe](#) [Privacy](#) [Do Not Sell My Data](#)[Email this page](#)

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Objective Qualifications for Superintendent Search are MIA

Submitted by [Hari Titan](#) on Sun, 01/18/2015 - 5:10pm

Late last year the PUSD School Board hired HYA Executive Search to perform the search to replace Connie Hubbard who is retiring this year.

Modern job postings have separate sections for "**job duties and responsibilities**" and the more objective "**qualifications**", both required and preferred.

At a prior board meeting that I attended, Board President Swenson explained that the Board would like community input on "**attributes**" for the next superintendent and I left the meeting thinking this concept would include input on more objective desired qualifications for the next superintendent.

HYA Solicits Public Input only on Duties and Responsibilities

In a recent survey conducted by HYA they primarily requested feedback on **characteristics** which they refer to what most people would call "job duties and responsibilities":

- *Listen to and effectively represent the interests and concerns of students, staff, parents, and community members.*
- *Be visible throughout the District and actively engaged in community life.*

- *Maintain positive and collaborative working relationships with the school board and its members.*
- *Effectively plan and manage the long-term financial health of the District.*
- *Identify, confront, and resolve issues and concerns in a timely manner.*
- *Involve appropriate stakeholders in the decision-making process.*
- *Act in accordance with the District's mission, vision, and core beliefs.*
- *Seek a high level of engagement with principals and other school-site leaders.*
- *Increase academic performance and accountability at all levels and for all its students, including special needs populations.*
- *Utilize student achievement data to drive the District's instructional decision-making.*
- *Be an effective manager of the District's day-to-day operations.*
- *Promote high expectations for all students and personnel.*
- *Have a clear vision of what is required to provide exemplary educational services and implement effective change.*
- *Hold a deep appreciation for diversity and the importance of providing safe and caring school environments.*
- *Lead in an encouraging, participatory, and team-focused manner.*
- *Align budgets, long-range plans, and operational procedures with the District's vision, mission, and goals.*
- *Provide meaningful guidance for systematic and comprehensive district-wide curriculum, instructional services, assessment programs, and professional development.*
- *Communicate effectively with a variety of audiences and in a variety of ways.*
- *Foster a positive professional climate of mutual trust and respect among faculty, staff, and administrators.*
- *Guide the operation and maintenance of school facilities to ensure secure, safe, and clean school environments that support learning.*
- *Encourage a sense of shared responsibility among all stakeholders regarding success in student learning.*
- *Hold a deep understanding of the teaching/learning process and of the importance of educational technology.*
- *Develop strong relationships with constituents, local government, area businesses, media, and community partners.*
- *Recruit, employ, evaluate, and retain effective personnel throughout the District and its schools.*
- *Strive for continuous improvement in all areas of the District.*

The survey can be filled out here: <http://www.ecrasurvey.com/piedmont> and includes 2 open ended questions where one could enter desired qualifications.

However based on the communities they serve on their website, HYA appears to **only incorporate community feedback on duties and responsibilities** (which they call "characteristics") in their search for superintendents, see: <http://www.ecragroup.com/active-searches> .

Even their EDJOIN.ORG posting for our PUSD superintendent excludes any mention of qualifications, see: <http://www.edjoin.org/viewPosting.aspx?postingID=640347&countyID=1&onlin...> . Other EDJOIN postings often require transcripts with degrees listed for example.

I'm sure HYA does collect a candidates qualifications at the time of applying for the position.

However if the job posting does not contain exemplary qualifications it is hard to believe candidates possessing those qualifications would apply for the job or would be actively recruited for.

PUSD has used Objective Qualifications for previous hires

As an example, take a look at the PUSD job posting for the Chief Business Official hired last summer: <http://www.edjoin.org/JobDescription.aspx?descriptionID=133258> . That job posting included a section on objective qualifications:

Preferred Education and Experience:

- *Completion of a bachelor's degree, or a higher degree, from a fully accredited college or university in Business Management or Public Administration; master's degree preferred*
- *Five to ten years of financial and business management experience with the day-to-day operations of an organization, experience in strategic planning and execution preferred*
- *Three years of significant knowledge and direct experience with California school finance accounting, experience in computer-based accounting applications (Standardized Account Code Structure (SACS),*
- *CASBO certification is preferred*
- *United States Certified Public Account (CPA) preferred*

Need for Objective Qualifications

If we want our kids to get into top tier universities, do we not want our superintendent to have graduated from one?

If we want our kids to be prepared for the scientific information age, should the superintendent have an undergraduate degree in a STEM discipline?

If we want our superintendent to excel in communication with the public, should we ask for a high verbal GRE score?

If we want our superintendent to understand the pitfalls of creative financing, should we ask for a high math GRE score?

What other standards can we apply?

Piedmont is an excellent school district and we need to not risk losing that status. The best way is to aim with high standards at the time of hiring.

If anyone complains about the quality of a teacher after they have tenure, we need to observe the hierarchy within the district. The superintendent helped hire the principals who hired or mismanaged the teacher being complained about.

If we hire the superintendent with objectively low standards, we will fail parents for years to come.

These are many of the reasons why it is so important to have objective high standards for our superintendent.

Conclusion

It appears that recruiting for our superintendent is focused on intangible and subjective feeling by HYA and the school board that a candidate can perform the job duties listed.

Without listing objective **required or preferred** qualifications for the position, these matters will all be handled outside of public view and without incorporating public input.

This is why **Objective Qualifications are MIA** (missing in action) in the search for our next superintendent.

We need to send out a search party to find what happened to these. Was this done intentionally to help certain candidates or an oversight of the board?

Ideally we should conduct a survey on what the public feels those objective qualifications should be.

Tags:

- [superintendent](#)

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Bernard Pech

10 years ago

The job posting for the superintendent at [edjoin.org](#) (<http://www.edjoin.org/viewP...> has now been removed. I took care of that.

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Competing schools hire top school talent

Submitted by [Hari Titan](#) on Mon, 02/09/2015 - 7:05am

The HYA “characteristic” poll results and community feedback on selection criteria for superintendent of schools are now available on the School Board meeting packet. Based on how most jobs are posted, I interpret the HYA poll as trying to find out goals or duties of the job, not identifying any measurable qualifications of the candidate to be able to achieve these goals. HYA disregarded numerous complaints about this discrepancy.

HYA does not reference any objective required qualifications in their proposal to the School Board. HYA did re-post the job on Edjoin requiring essentially a career school administrator with state-level credentials.

HYA refers to our community as being “well-educated” and their letter refers to maintaining high “academic” standards a number of times, and both the public and the school board chose a “clear vision of what is required to provide exemplary educational services” as one of their top 3 goals. I did not see any job requirements that tie into these goals.

My suggestion that the School Board give preference to student's first choice universities is being taken by our competing schools: The Head of Schools from Head Royce has a Masters from Dartmouth (ranked #11 nationwide). The CPS Head of Schools has a Masters from Case Western Reserve (ranked #37 nationwide). The Palo Alto superintendent of schools has a PhD from U. Chicago (ranked #4 nationwide) and over a decade of credentials promoting STEM education.

Most of these superintendents did not go to "Ivy League" universities. Also I never said we should hire exclusively from the few east-coast "Ivy League" schools, nor should we be ruling them out. I spoke about giving a hiring preference for "top schools", based on their ranking (e.g. US News): <http://www.usnews.com/rankings> and / or the schools our kids want to get into (as their first preference). This was meant to give a leg up for our students independent of their specific college matriculation goals.

At the end of the year, one of the hardest jobs of a superintendent is to maintain or improve the academic ranking of PUSD amongst other school districts. To pursue this goal, the superintendent should help the District prepare students (both academically and socially) for university, should they choose to take that route. Another challenge our superintendent has is to not lose students to local private schools or competing school districts in the Bay Area. Hiring for these toughest components of the job is a prudent and wise strategy.

A superintendent who went to one of the universities that many of our kids are trying to get into would have personal experience and insights that should give our kids a leg up. Does our assistant superintendent (with a Masters from St Mary's College) have that insight? Why should the School Board consider all university degrees as being equivalent to each other?

- Palo Alto superintendent: <https://www.linkedin.com/pub/glenn-%22max%22-mcgee/1a/284/268>
- College Prep School superintendent: <https://www.linkedin.com/pub/monique-devane/b/795/997>
- Head Royce superintendent: <https://www.linkedin.com/pub/rob-lake/49/433/174>
- Fremont superintendent: <http://www.tricityvoice.com/articlefiledisplay.php?issue=2010-05-11&file...>

Randy Booker: http://www.insidebayarea.com/california/ci_18756021

The only way to find this position on EdJoin.com requires a job search for positions requiring applicants be **certificated** for employment as a superintendent. Here is the Ed Join link (note the top of the search requirements) and clicking the one link (Alameda County) will reveal the position for Superintendent of PUSD:

<https://www.edjoin.org/Home/Jobs?keywords=&searchType=all&states=24®i...>

The State of California Certification for Superintendents is not a state requirement to have prior to employment but an optional requirement the District / HYA has chosen for this position. The State credentialing requirements for administrators are on the *State of California Commission on Teacher Credentialing* website:

<http://www.ctc.ca.gov/credentials/leaflets/c1574c.pdf>

You will notice it requires 5 years on the job experience as well as passing various exams. I would say this decision results in restricting candidates to career administrators.

Tags:

- [superintendent](#)

3 Comments



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Best Newest Oldest**Hari Titan**

6 years ago

The Piedmonter published a follow-up article that corrects the Ivy League comments and provides evidence that other nearby schools are seeking talent from top ranked universities, without suffering any additional loss of diversity.

<https://www.eastbaytimes.co...>0 0 Reply **Hari Titan**

10 years ago

Someone forwarded these posts to me from Next Door - Dracena Park. They show some context around why it is hard to believe he was the top choice.

Susy Struble from Upper Piedmont:

As someone else relatively new here, I have to say I was disappointed by the quality of the search process. I don't know what the typical candidate pool would be for such a search, but with almost 14,000 public school districts in the US (I believe), one would think we'd have a larger candidate pool. I presume the candidate pool would have also included administrators of private schools and, one hopes, even qualified candidates from outside the higher ed industry. Yet we received only 45 applicants for a job in an amazing small town in the SF Bay area that pays almost \$300K a year with great benefits. I'm confident Mr. Booker will do fine, and I will certainly support him, but the whole thing is just weird to me.

Kathi Roisen from Dracena Park:

I'm currently "out of the system" in that both my kids have long graduated.. But I remember many conversations with Randy Booker; and what stands out in my mind was that he was very opposed to honors classes and used to joke about how he was a 'C' student and didn't get all the fuss in Piedmont from families who wanted to offer their kids accelerated paths. He would not have been my first choice by a long shot. Nice guy, yes, but thoroughly anti-intellectual.

Jackie Slabaugh from Upper Piedmont:

... limited:
0 - Years as a Superintendent
3 - Years as an Assistant Superintendent
2 - School Districts Worked ...

Garrett Keating from Dracena Park:

Interested in details on the candidates who were not chosen. Possibly may not be public information... [redacted] but basic facts about others credentials sans names and institutions would be of interest to the community.

0 0 Reply **Hari Titan**

10 years ago

It seems the HYA website application submission has been broken for weeks. I noticed this problem at their public meeting and it hasn't been fixed. It seems the only way to apply for this position is to email Barbara Young directly : youngbb@me.com (847) 318-0072 and perhaps CC the School Board.

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Transparency Lost

Submitted by [Hari Titan](#) on Wed, 03/24/2021 - 4:52pm

Negotiations with the teacher's union have now lasted more than 365 days with more negotiations this week. After immense public pressure, including hundreds of lawn signs demanding a discussion about what will happen in the 2021-22 school year in the fall, the school board agreed to put that discussion on the table tonight, March 24, 2021.

Plans for extending hours this spring and the 2021-22 school year just got easier thanks to health agencies revising the minimum distance between student desks from 6 feet down to 3 feet, allowing classes to fill up with students like it was 2019. But we are not done just yet. Union contracts still dictate 6 feet between desks and the administration is citing numerous logistical challenges.

Many things about the entire reopening process were opaque. Schedules were created with fewer hours of in-person instruction than parents expected due to surprise blockers with little explanation.

Hundreds of questions sent to the school board remain unanswered. Memoranda of understanding with unions were arrived at after negotiation and then celebrated and approved at school board meetings.

Negotiations between administrators and teachers are a window into both what the administration is looking for and what unions are looking for. Keeping that entire process hidden was a key contributor to the frustration and surprises that many hundreds of parents and

students felt. I was curious about why this process was so secretive, unlike much more open negotiations in other unionized industries like healthcare.

It was suggested that I learn about the Rodda Act, known formally as the Educational Employment Relations Act (EERA). It is named after its sponsor, former State Senator Albert Rodda. The EERA is regulated by the California Public Employment Relations Board (Cal-PERB). A little-known provision in the Rodda Act mandates that school districts reveal the initial bargaining positions of both sides at a public school board meeting, allow public input on what the administration should be asking for, and the school board vote on their initial proposal. All of these steps have to occur prior to the start of the negotiation. Unfortunately after the onset of the pandemic Piedmont Unified never followed this procedure.

This sunshine clause was enacted as Government Code 3547 and was used correctly by at least one other school district, Fremont Unified. This law is very clear, helpful, and should be followed.

After emailing the superintendent and school board I got a response from Randy Booker stating he prefers all parties create language collaboratively at the bargaining table instead of formalizing an initial bargaining proposal. The lack of a formal bargaining proposal allows the district to bypass the Rodda Act and leaves nothing for public discussion and the school board to vote on. This low-paper-trail approach violates the spirit of the Rodda Act even if it is a legal way to bypass it.

To understand the Rodda Act's sunshine process in detail, read the text of [Government Code 3547](#).

Tags:

- [transparency](#)

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[Parents for Educational Excellence in Piedmont \(PEEP\)](#)

Seeking desirable qualities of the next superintendent

Parents for Educational Excellence in Piedmont <excellencepusd@gmail.com>
To: schoolboard@piedmont.k12.ca.us
Cc: Hari Titan <hstitan@yahoo.com>

Tue, Jan 31, 2023 at 1:06 PM

Note: Resending original email to include newly elected board members Ruchi and Lindsay.

Dear School Board Members,

The context of my original email was to help formulate the job posting for Superintendent, attached. I think researching the credentials of almost all Bay Area Superintendents might have helped support the decision of the prior board to add " (Doctorate preferable)" to the PUSD job advertisement since my research shows the vast majority of Bay Area Superintendents also have a doctorate.

Also, I think we are all very impressed with Dr. Evans which might have contributed to this decision as well :)

Please note that having a doctorate is not in and of itself enough but what they accomplished for their prior school district(s) is equally if not more important. I think where they got their doctorate also matters in terms of rigor and clarity of direction which will come in handy when explaining things to the parent community in Piedmont.

Having the credentials of most Bay Area Superintendents handy (see links to LinkedIn profiles) will also help the school board compare against the applicant pool and decide if some/many/most applicants are "on par" with the best Superintendents in the Bay Area. Dr. Evans would also be a great resource in this regard in case he knows any of the applicants or can help identify which Bay Area superintendents could be considered among "the best" in relation to the needs of Piedmont Unified.

Thank you to the prior school board for including the thoughts of PEEP.

Best of luck when you begin reviewing resumes over the next few days.

Hari Titan

<https://EdExcellencePiedmont.com>

[Quoted text hidden]

2 attachments

-  **Piedmont-USD-Superintendent-Position-Description-12-9-22.pdf**
147K
-  **Bay Area Superintendents.pdf**
93K

Independent Financial Analysis confirms
Teachers getting short stick

Vote YES on Measures G & H

Hari Titan

October 1, 2019

Parcel Tax Measures funding quality K-12 education in Piedmont

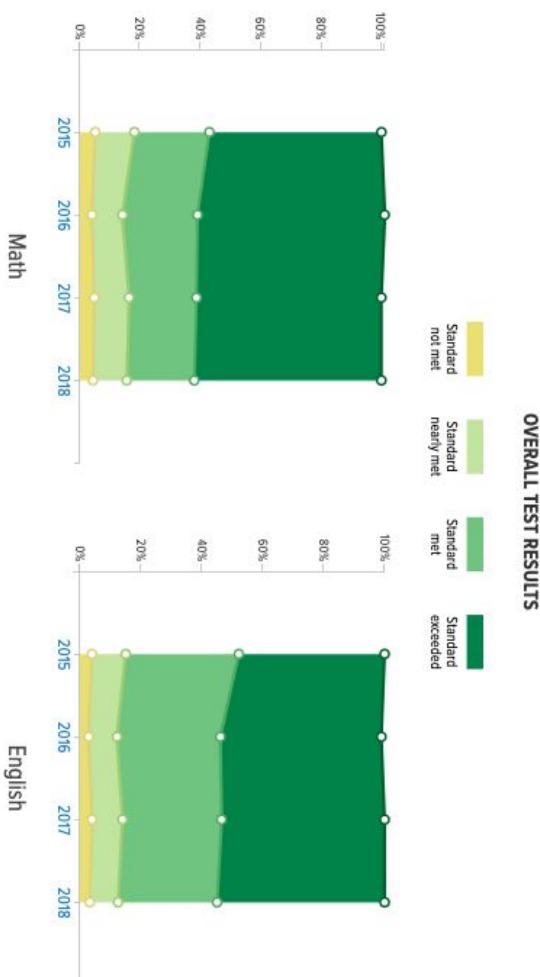
Good Schools Benefit Everyone in Piedmont

- Maximize Student Achievement and Potential
- Reason for Parents to move to Piedmont
- Reason for Teachers to prefer to teach in Piedmont
- A big reason behind the relative stability and price appreciation of Piedmont homes
- Higher school property taxes are a small price to pay for a higher likelihood of higher resale values

Piedmont City Unified

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California Smarter Balanced CAASPP scores are for 2018 unless otherwise noted. Data on subgroups, such as grade level, where 10 or fewer students had test scores for either English Language Arts or Math, are shown with asterisks. Data may not add up to 100% due to rounding. Hover over colors in charts to see exact percentages for each achievement level.



2018 CAASPP Scores District-wide

Over 2015-18 K-12 teachers helped more students exceed the CAASPP standard (57% -> 62% in Math and 48% -> 55% in English) and kept the “Standard not met” at or below 5% in Math and at or below 4% in English

PHS is ranked 8th in English Language Arts and 15th in Mathematics in California

Source: <http://www.piedmont.k12.ca.us/phs/pdf/about-phs/profile.pdf>

Source: http://caaspp.edsource.org/sbac/piedmont-city-unified-016127500_00000

Academic Performance

View Student Assessment Results and other aspects of school performance.

[LEARN MORE](#)
English Language Arts



All Students State

[LEARN MORE](#)
Mathematics



All Students State

[LEARN MORE](#)
College/Career



All Students State

110.8 points above standard
Declined 8.5 Points ^④

72.1 points above standard
Increased 13.4 Points

85.6% prepared
Declined 6.8% ^④

In 2018, 85.6% of PHS graduates were “prepared” according to the CCI.

For the PUSD district as a whole (including MHS), 79.4% of graduates were “prepared” and another 12.4% were “approaching prepared.”

For more details on what goes into the CCI contact PUSD’s Stephanie Griffin. This [link](#) breaks down the CCI for different student groups.

COLLEGE MATRICULATION

College and University Attendance for the Class of 2018

American University	Macalester College	Stevenson Institute of Technology	Washington University in St. Louis
Arizona State University	Marquette University	The New School	Western Washington University
Berkley City College	Massachusetts Institute of Technology	Trinity University	Wheaton College
Chabot College	Miami University, Ohio	Tufts University	Willamette University
Chapman University	New York University	Tulane University	University of California
College of Charleston	Northeastern University	University of Alabama	UC Davis
College of Marin	Northwestern University	University of Arizona	UC Irvine
Colorado College	Oberlin College of Arts & Science	University of Colorado	UC Los Angeles
Dartmouth College	Ohio State University	University of Connecticut	UC Riverside
Denison University	Orange Coast College	University of Denver	UC Santa Barbara
DePaul University	Oregon State University	University of Michigan	UC Santa Cruz
Diablo Valley College	Peralta Community Colleges	University of Mississippi	University of Nebraska
Emerson College	Fashion Institute of Technology	University of Nebraska	University of Oregon
Goucher College	Princeton University	University of Oregon	Purdue University
Grinnell College	Purdue University	University of Pittsburgh	University of Portland
Harvard University	Quinnipiac University	University of Pittsburgh	University of Puget Sound
Iona College	Reed College	University of Portland	University of San Francisco
Johns Hopkins University	Regis University	University of Puget Sound	University of San Francisco
Kenyon College	Saint Mary's College of CA	University of San Francisco	University of Southern California
Lehigh University	Santa Clara University	University of San Francisco	University of Tennessee
Lewis and Clark College	Scripps College	University of San Francisco	University of the Pacific
Linfield College	Seattle University	University of San Francisco	University of Vermont
Loyola Marymount University	Smith College	University of San Francisco	University of Virginia
Loyola University New Orleans	Stanford University	University of San Francisco	University of Washington
	Washington State	University of San Francisco	University of Wisconsin
		International Universities	Vanderbilt University
		McGill University	Washington State
		University of British Columbia	University of Glasgow, Scotland
		University of Edinburgh, Scotland	

Source:

<http://www.piedmont.k12.ca.us/phs/pdf/about-phs/profile.pdf>

PHS does not provide the exact number of students attending each college and university (a.k.a. Matriculation counts)

For that information, see:
https://hartfian.com/Piedmont_Grad_College_Entrances.pdf

On Measure G:

“This local funding source helps us maintain smaller class sizes, and provides funding for art and music, world languages, advanced placement courses, school libraries, classroom technology, and student counseling.”

-- Randy Booker, Superintendent of PUSD (August 15, 2019 email)

On Measure H:

“The second measure is a companion measure that will provide critically needed funding to attract and retain high quality teachers and educational support staff. As you may be aware, inadequate state funding coupled with the high cost of living in the Bay Area makes retaining and recruiting quality teachers and educational staff difficult. Over the past two years, 22 teachers left the District due to cost of living issues. Additionally, numerous teaching candidates we've recruited for classroom positions went to other districts for the same reason. The cost of this companion measure will be 25 cents per square foot of building improvements.”

-- Randy Booker, Superintendent of PUSD (August 15, 2019 email)

ADVANCED PLACEMENT & HONORS COURSES

Due to prerequisites, most AP and Honors classes are intended for Juniors and Seniors.

Advanced Placement Courses

AP Biology	AP European History
AP Calculus AB	AP French Language
AP Calculus BC	AP Music Theory (alternating years)
AP Chinese Language	AP Spanish Language
AP Computer Science A	AP Studio Art: 2-D Design
AP Computer Principles	AP Studio Art: 3-D Design
AP English Literature	AP US History
AP Environmental Science	

Honors Courses

English 5-6 Honors	Chinese IV Honors*
Chemistry Honors	Physics Honors
Spanish IV Honors*	Statistics Honors
French IV Honors*	

*offered beginning Fall 2017

Due to the teacher shortage, PHS offered online curriculum for Spanish 2, Physics, and Physics Honors during the Fall semester of the 18-19 school year.

STANDARDIZED TESTS

National Merit Class of 2018:

6 Finalists, 6 Semifinalists, 14 Commended

AP Exam Scores May 2018:

293 students took 524 AP exams

87% of these exams received a score of 3 or higher

Source: <http://www.piedmont.k12.ca.us/phs/pdf/about-phs/profile.pdf>

We have 7 periods and some other schools (e.g. Alameda Unified) have cut back to only 6 periods.

In 2019-20, PHS is not offering AP European History and instead is offering AP Art History

“CAASPP results... for Piedmont K-12 vs. other K-12 districts -- we are #2 in the state and #1 in Northern California”

-- Cory Smegal, School Board member (email 9/30/2019)

For Piedmont Schools



- 74% of the voters approved Measure H1 in 2016
- Funds being used to build a modern S.T.E.A.M. classroom building and Performing Arts Theater
- Retaining good teachers is clearly more important than facilities at any point in time
- However in light of the goal of building a center of excellence in S.T.E.A.M. education, retaining high quality teachers is even more important



Students' education should not be harmed

“A lot is at stake. Over 25% of the school district’s budget is funded by the school parcel tax. If Measures G and H do not pass, up to 100 teacher positions will be eliminated, many academic and advanced programs in math, science, technology, engineering, English, music and the visual and performing arts, will be slashed, school libraries will close, class sizes will increase by as much as 40%, and it will become more and more difficult to attract and retain quality teachers and educational staff. (Over the past two years, 22 teachers left the district due to cost of living issues. Additionally, numerous teaching candidates recruited for classroom positions went to other districts for the same reason.)

To pass, each measure must receive at least 66.7% support from those who vote on the measure.”

Source: <https://www.yesongandh.org/>

What uses are promised for Measure H funds?

“Measures G and H will generate \$13.4 million annually for the Piedmont schools. Measure G will cost all homeowners \$2,763 per year. The cost to homeowners for Measure H will be 25 cents per square foot of their home.

Over the past few years the board has heard input from the community asking our school district to levy a parcel tax based on the square footage of one’s home (like ones recently passed in Alameda, Berkeley, and Emeryville). The board decided to keep the basic parcel tax, Measure G, as a flat tax, and add Measure H (a second parcel tax based on square footage) to help fund the \$2.6 million/year needed to attract and retain high quality teachers and support staff.”

Sources: <https://www.yesongandh.org/>

<http://www.piedmont.k12.ca.us/district-info/budget/measure-g-and-h-parcel-taxes/>

Is PUSD underfunded?

Relative to nearby public school districts

General Fund Revenues by Object Code, 2017-18

Piedmont City Unified

Source: <https://www.ed-data.org/district/Alameda/Piedmont-City-Unified>

Data Table Graphs

Object Codes	Type of Revenue	Revenues			This District (ADA 2,552)	% Avg Unified School Districts	Dollar/Student (ADA) *	
		Unrestricted	Restricted	Total			Statewide Avg Unified School Districts	Statewide Avg All Districts
8010-8099 ~	LCFF Sources *	\$20,555,417	\$19,349	\$20,746,766	\$8,129	83%	\$9,749	\$9,892
8100-8299 ~	Federal Revenue *	\$0	\$678,885	\$678,885	\$266	36%	\$736	\$705
8300-8599 ~	Other State Revenue *	\$1,020,277	\$1,478,860	\$2,499,137	\$979	63%	\$1,433	\$1,357
8600-8799 ~	Other Local Revenue *	\$14,619,721	\$1,211,189	\$15,830,910	\$6,203	883%	\$703	\$761
Total Revenues		\$36,195,415	\$3,560,253	\$39,755,668	\$15,578	123%	\$12,620	\$12,714

This table summarizes the main sources of revenue for the district or county office. These are labeled as

Read More

Source: California Department of Education, School Fiscal Services Division: SACS Unaudited Actual Data.

General Fund Revenues by Object Code, 2017-18

Berkeley Unified

Data Table Graphs

Object Codes	Type of Revenue	Revenues			This District (ADA 9,346)	% Avg Unified School Districts	Dollar/Student (ADA) *	
		Unrestricted	Restricted	Total			Statewide Avg Unified School Districts	Statewide Avg All Districts
8010-8099 ~	LCFF Sources *	\$85,280,827	\$600,312	\$85,881,139	\$9,189	94%	\$9,749	\$9,892
8100-8299 ~	Federal Revenue *	\$500	\$3,609,707	\$3,610,207	\$386	53%	\$736	\$705
8300-8599 ~	Other State Revenue *	\$3,246,275	\$10,447,484	\$13,693,759	\$1,465	102%	\$1,433	\$1,357
8600-8799 ~	Other Local Revenue *	\$38,827,672	\$14,754,167	\$53,591,839	\$5,734	816%	\$703	\$761
Total Revenues		\$127,365,273	\$29,411,670	\$156,776,943	\$16,775	133%	\$12,620	\$12,714

Berkeley Unified has a much smaller \$878 funding shortfall and yet collects 816% the state norm in local revenue.

Berkeley ends up collecting \$16,775 per student in total which is 7.7% higher than PUSD collects in total.

→ 883% of the state norm

We need more local revenue due to a \$2,544 per student State and Federal funding shortfall. That's why our parcel tax + donations seem high.

PUSD receives 123% of the average statewide funding per student (\$15,578 vs \$12,620) from all revenue sources.

Is PUSD underfunded? YES

- Piedmont Unified collects 7.7% less money (combined from all sources) per student than Berkeley Unified does. This is primarily because Piedmont has a \$2,544 State and Federal funding shortfall. This shortfall is by virtue of Piedmont having fewer “high need” students:

“In 2013, California implemented the Local Control Funding Formula (LCFF), shifting from a complex system with more than 50 funding categories to a multi-tiered formula that directs extra funding to “high need” (economically disadvantaged, English Learner, or foster youth) students. The LCFF provides a base amount of funding keyed to each district’s average daily attendance. Districts then receive a 20% supplement for each high-need student, and districts with relatively large shares of high-need students receive additional dollars.”

Source: PublicPolicyInstituteofCalifornia.org

- Measure G’s \$2,709 seems to be in the same ballpark as the State and Federal funding shortfall without the additional costs associated with “high need” students
- The state level funding look doesn’t even touch the issue of California funding education less than the National average while having a higher cost of living. This makes it hard to attract out-of-state teachers
- Based on our per student funding, how well are teachers being paid? See the next section for answers.

Are Teachers Underpaid?

Relative to living costs and nearby desirable school districts

“...teachers either moving out of state because it's so expensive here or leaving the profession all together”

Cory Smegal, School Board member (email Sept 30, 2019)

COST OF LIVING

	Alameda	California	USA
<u>Overall</u>	221.4	168.6	100
<u>Grocery</u>	110.8	107.2	100
<u>Health</u>	97.6	92.8	100
<u>Housing</u>	471.8	293.1	100
<u>Median Home Cost</u>	\$901,100	\$548,600	\$219,700
<u>Utilities</u>	93.1	102.4	100
<u>Transportation</u>	129.6	146.5	100
<u>Miscellaneous</u>	113.5	103.7	100

Source: https://www.bestplaces.net/cost_of_living/county/california/alameda

The cost of living in Alameda county is **131%** (=221.4/168.6) the cost of living in California

The same site reports Piedmont's cost of living index as 377.2 which is 224% the cost of living in California

The Piedmont cost of living impacts the affordability of Measures G & H for Piedmont taxpayers.

Measure G is primarily an extension of an existing Measure (A).

Measure H is a return to progressive taxation (based on home square footage) which hopefully tracks the ability to pay. A more pure local income tax is not legal in California.

100=National Average

General Fund Expenditures by Object Code, 2017-18

Piedmont City Unified



<https://www.ed-data.org/district/Alameda/Piedmont-City-Unified>

Data Table Graphs

Object Codes	Type of Expenditure	Expenditures			This District (ADA: 2,552)	% Avg Unified School Districts	Dollars/Student (ADA)	Statewide Avg Unified School Districts	Statewide Avg All Districts
		Unrestricted	Restricted	Total					
1000-1999	Certificated Personnel Salaries	\$15,556,431	\$2,617,592	\$18,174,023	\$7,121	133%	\$5,366	\$5,427	\$5,427
1100	Certificated Teachers' Salaries	\$12,017,467	\$2,125,733	\$14,143,200	\$5,542	129%	\$4,306	\$4,379	\$4,379
1200	Certificated Pupil Support Salaries	\$1,303,518	\$318,842	\$1,622,360	\$636	169%	\$375	\$367	\$367
1300	Certificated Supervisors' and Administrators' Salaries	\$1,708,750	\$143,939	\$1,852,669	\$726	141%	\$313	\$24	\$24
1900	Other Certificated Salaries	\$226,716	\$29,078	\$555,794	\$218	127%	\$171	\$158	\$158
Subtotal, Certificated Personnel Salaries		\$15,556,431	\$2,617,592	\$18,174,023	\$7,121	133%	\$5,366	\$5,427	\$5,427
2000-2999	Classified Personnel Salaries	\$4,543,544	\$2,172,882	\$5,716,406	\$2,240	121%	\$1,853	\$1,868	\$1,868
2100	Classified Instructional Salaries	\$564,475	\$1,776,473	\$2,144,948	\$840	190%	\$443	\$451	\$451
2200	Classified Support Salaries	\$206,870	\$229,542	\$1,256,412	\$484	75%	\$649	\$643	\$643
2300	Classified Supervisors' and Administrators' Salaries	\$284,499	\$0	\$284,499	\$111	76%	\$146	\$149	\$149
2400	Clerical, Technical, and Office Staff Salaries	\$1,643,900	\$52,149	\$1,696,049	\$665	141%	\$472	\$480	\$480
2900	Other Classified Salaries	\$339,800	\$14,658	\$354,459	\$139	97%	\$144	\$144	\$144
Subtotal, Classified Personnel Salaries		\$2,543,544	\$2,172,882	\$5,716,406	\$2,240	121%	\$1,853	\$1,868	\$1,868
3000-3999	Employee Benefits	\$7,032,867	\$2,162,001	\$10,194,868	\$3,995	128%	\$3,111	\$3,097	\$3,097
3101	State Teachers' Retirement System, certificated positions	\$21,55,809	\$1,415,827	\$3,571,656	\$1,400	123%	\$1,136	\$1,142	\$1,147
3102	State Teachers' Retirement System, classified positions	\$4,512	\$4649	\$9,161	\$4	90%	\$4	\$5	\$5
Subtotal, State Teachers' Retirement System		\$2,160,321	\$1,420,476	\$3,580,797	\$1,403	123%	\$1,140	\$1,147	\$1,147
3201	Public Employees' Retirement System, certificated positions	\$30,832	\$0	\$30,832	\$12	109%	\$11	\$12	\$12
3202	Public Employees' Retirement System, classified positions	\$482,025	\$318,888	\$800,913	\$314	128%	\$246	\$249	\$249

Compared to the California average per certificated FTE per student, PUSD pays:

- **129% for teachers**
- **141% for administrators**

Compared to the California average per certificated FTE per student, Palo Alto Unified pays:

- **124% for teachers**
- **128% for administrators**

This view does not account for student teacher ratios or ... see following slides to account for those differences



-Select another year- ▾

Selected District Level Data - 01611275-Piedmont City Unified
for the year 2017-18

District	District Code	Enrollment	FTE Administrators	FTE Pupil Sys	FTE Teachers	# Classified Staff	Pupil Teacher Ratio
Piedmont City Unified	01611275	2,623	14.1	20.0	166.7	129	15.7
County Total:		228,356	963.5	976.3	11,543.7	8,158	19.8
State Totals:		6,220,413	25,398.1	30,100.5	295,465.7	255,259	21.1



California Department of Education

-Select another year- ▾

Selected District Level Data - 01611143-Berkeley Unified
for the year 2017-18

District	District Code	Enrollment	FTE Administrators	FTE Pupil Sys	FTE Teachers	# Classified Staff	Pupil Teacher Ratio
Berkeley Unified	0161143	10,340	53.0	45.9	602.1	458	17.2
County Total:		228,356	963.5	976.3	11,543.7	8,158	19.8
State Totals:		6,220,413	25,398.1	30,100.5	295,465.7	255,259	21.1

This may translate to smaller class sizes or more time for curriculum and staff development.

We'll use the FTE teacher count in the next slide.

The prior slide didn't incorporate differences in the number of FTE teachers hired per student (ADA).

Piedmont has "more teachers per student" or rather "fewer students per FTE teacher hired" compared to Berkeley.

Source: <https://data1.cde.ca.gov/datasets/t/page2.asp?level=District&subject=Profile>

General Fund Expenditures by Object Code, 2017-18

Piedmont City Unified

Data Table Graphs



Object Codes	Type of Expenditure	Expenditures			This District (ADA:2,552)	% Avg Unified School Districts	Dollars/Student (ADA) ●
		Unrestricted	Restricted	Total			
1000-1999 ▲	Certificated Personnel Salaries	\$15,556,431	\$2,617,592	\$18,174,023	\$7,121	133%	\$5,366
1100 ●	Certificated Teachers' Salaries	\$12,017,467	\$2,125,733	\$14,143,200	\$5,542	129%	\$4,306
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1300 ●	Certificated Supervisors' and Administrators' Salaries	\$1,708,750	\$143,939	\$1,852,669	\$726	141%	\$513
1900 ●	Other Certificated Salaries	\$226,716	\$29,078	\$555,794	\$218	127%	\$171
Subtotal, Certificated Personnel Salaries		\$15,556,431	\$2,617,592	\$18,174,023	\$7,121	133%	\$5,366
2000-2999 ▲	Classified Personnel Salaries	\$4,543,544	\$2,172,882	\$5,716,406	\$2,240	121%	\$1,853
2100 ●	Classified Instructional Salaries	\$564,475	\$1,776,473	\$2,144,948	\$840	190%	\$443
2200 ●	Classified Support Salaries	\$306,870	\$329,542	\$526,412	\$484	75%	\$649
2300 ●	Classified Supervisors' and Administrators' Salaries	\$284,499	\$0	\$284,499	\$111	76%	\$146
2400 ●	Clerical, Technical, and Office Staff Salaries	\$1,643,900	\$52,149	\$1,696,049	\$665	141%	\$472
2900 ●	Other Classified Salaries	\$339,800	\$14,658	\$354,459	\$139	97%	\$144
Subtotal, Classified Personnel Salaries		\$2,543,544	\$2,172,882	\$5,716,406	\$2,240	121%	\$1,853
3000-3999 ▲	Employee Benefits	\$7,032,867	\$3,162,001	\$10,194,868	\$3,995	128%	\$3,111
3101 ●	State Teachers' Retirement System, certificated positions	\$2,155,809	\$1,415,827	\$3,571,636	\$1,400	123%	\$1,135
3102 ●	State Teachers' Retirement System, classified positions	\$4,512	\$4,649	\$9,161	\$4	90%	\$4
Subtotal, State Teachers' Retirement System		\$2,160,321	\$1,420,476	\$3,580,797	\$1,403	123%	\$1,140
3201 ●	Public Employees' Retirement System, certificated positions	\$30,832	\$0	\$30,832	\$12	109%	\$11
3202 ●	Public Employees' Retirement System, classified positions	\$482,025	\$318,888	\$800,913	\$314	128%	\$246

Source: <https://www.ed-data.org/district/AlamedaPiedmontCityUnified>

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Now we can divide the salary comp totals on this ed-data view with the FTE teacher counts from the previous slide to get the **average salary** per certificated FTE for 2017-18.

PUSD paid:

- \$ 84,842 per teacher and
- \$131,395 per administrator

Berkeley Unified paid:

- \$ 82,932 per teacher and
- \$115,441 per administrator

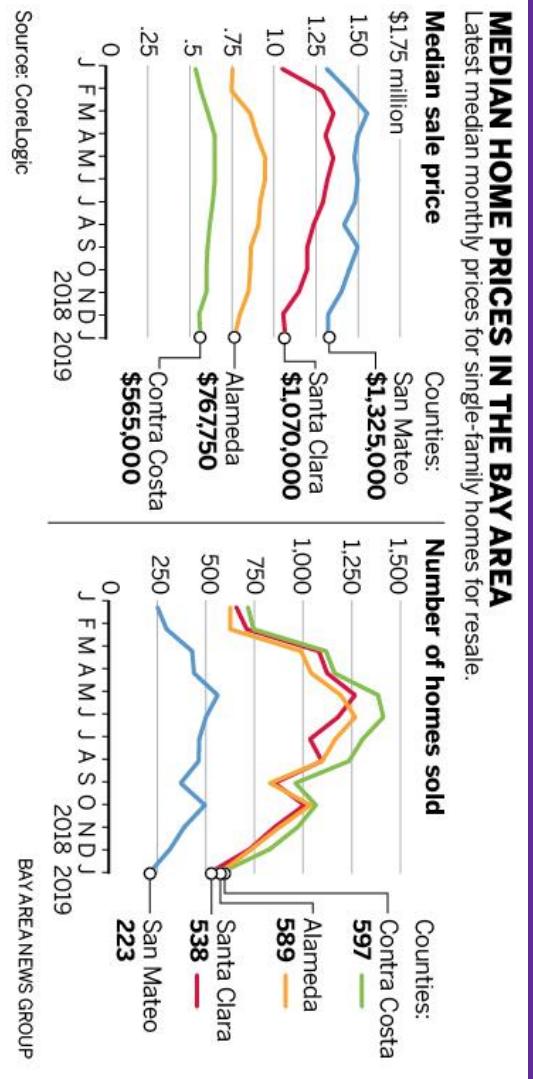
This comparison doesn't account for: 1) tenure differences; 2) changes from 2017-20 and; 3) total comp differences

California paid teachers starting from \$46,208 up to maximum \$92,742 (for districts with ADA between 1500 and 4999) in 2017-18

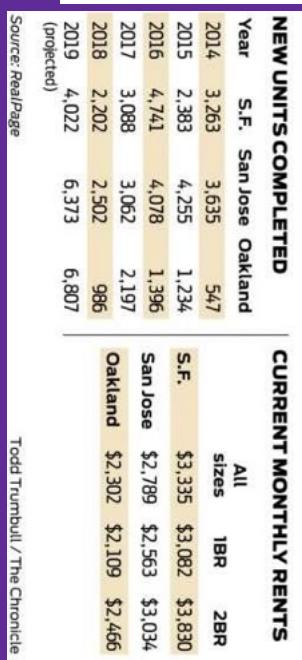
Source: <https://www.cde.ca.gov/fg/fi/salcefa/gsalaries>

Spiking rent likely to negatively affect new teachers who are more likely to be on a lower level and tenureayscale.

Are Measure H funds going to target new teachers with something like a “housing allowance” or “relocation assistance”?



Rents still on the rise
Year-over-year change for all size apartments in larger complexes not as much as last year, thanks to a surge of new apartments slated for completion in 2019.



Source: <https://www.mercurynews.com/2019/02/28/bay-area-home-sales-slow-but-prices-shift-back-into-high-gear/>

Source: <https://www.sfgate.com/business/networth/article/After-dull-Bay-Area-rents-are-rising-again-but-13528213.php>

Are Teachers Underpaid?

Likely YES

Compared to the State of California 1) The Alameda County cost of living is 31% higher and we only pay 29% higher per student while providing much better education than the average district in Alameda County; 2) teachers who are renting homes are suffering under recent rent hikes

Vote YES on Measures G & H

Funding to maintain a quality K-12 education in Piedmont

Based on 1) all the reasons stated by Superintendent Booker and the YES ON G&H campaign; 2) we collect 7.7% less money per student than Berkeley Unified does while providing an excellent education; 3) to maintain well above average education we need to pay well above average

APPENDIX

Parcel Tax should NOT be a referendum on:

- District personnel (incl. SB) or teacher hiring practices
- Seriously underfunded and unpredictable liabilities (e.g. Defined-benefit Pensions & Special Education)

The above concerns belong in productive discussion on bills like the Full and Fair Funding Act and during candidate elections

Please fill out this short survey:

<https://forms.gle/6mngcJzvuVEbRHpF9>



[Digital Town Hall](#) for the PUSD Board of Education

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Vote YES on Measures G & H

Submitted by [Hari Titan](#) on Tue, 10/01/2019 - 11:47pm

A few community members asked me to take an independent analytical look at whether or not parcel tax Measures G & H are justified. I decided to investigate using publicly available data provided by the State of California (which in turn is obtained directly from the school districts) as well as from other well regarded organizations that report on and summarize educational data obtained from the state or school districts on their website. I asked myself two questions: 1) Is PUSD underfunded? and; 2) Are teachers underpaid?

I wasn't sure I would be able to get everything I needed from online sources but it turns out I managed to get most of what I was looking for. I shared an earlier version of this report with the school board and got some feedback which I incorporated into the report. After discovering the answers to both my earlier questions were clearly YES, I also shared my report with the YES on G and H team.

To see my report click here: [https://HariTitan.com/Vote YES on Measures G and H.pdf](https://HariTitan.com/Vote_YES_on_Measures_G_and_H.pdf) (no signup required)

The main observations in my report are as follows. The State of California is underfunding Piedmont by thousands per child. Extending our current parcel tax with the Measure G parcel tax will primarily help us tread water. What this means for teachers is that we are paying just below average salaries for teachers in Alameda County. How can we afford to attract and retain high quality teachers with average or just below average salaries? I recommend you read my report which has hard numbers you may not have seen before.

The last slide requests your feedback with a link to a quick survey.

Distribution

At least 1560 emails were received and opened with my vote recommendation.

At least 343 people downloaded the report from the website. Report survey estimates 25% of report readers were influenced to vote yes and another 15% to maybe vote yes.

Partial Mail-in Ballot results, 9 pm on night of election: November 5, 2019



ELECTIONS	VOTING	RESOURCES	COMMUNITY	CANDIDATES
Measure G				
0 of 6 Precincts Reported(0.00%)			Needs majority Yes votes to pass	
Contest				
Yes	Votes			
2,499				
No	589			
Back to Top				
Measure H				
0 of 6 Precincts Reported(0.00%)			Needs majority Yes votes to pass	
Contest				
Yes	Votes			
2,242				
No	838			

All Precincts reporting, 10:30 pm on night of election: November 5, 2019

Measure G**6 of 6 Precincts Reported(100.00%)****Needs majority Yes****Contest****Yes****No****Back****Measure H****6 of 6 Precincts Reported(100.00%)****Needs majority Yes****Contest****Yes****No****Last update ... should include provisional ballots: November 8, 2019 EOD****Measure G - Piedmont USD****6 of 6 Precincts Reported(100.00%)****Needs 2/3 majority Yes votes to pass****Vote for One (1) Only****Contest****Yes****Votes****Percentage****3,655****82.88 %****No****755****17.12 %****Back to Top****Measure H - Piedmont USD****6 of 6 Precincts Reported(100.00%)****Needs 2/3 majority Yes votes to pass****Vote for One (1) Only****Contest****Yes****Votes****Percentage****3,269****74.40 %****No****1,125****25.60 %**

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[Share](#)[Best](#) [Newest](#) [Oldest](#)**Hari Titan**

5 years ago

The school board met a few days and approved a 3.5% salary increase based on the passage of Measure H last year.

0 0 Reply

**Jeff Wittich**

5 years ago

Thanks for putting this together. Well documented and data driven.

0 0 Reply

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For further information or questions: [Email Hari](#)

[Parents for Educational Excellence in Piedmont \(PEEP\)](#)



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A bigger Parcel Tax in 2020

Submitted by [Hari Titan](#) on Tue, 12/10/2013 - 12:13pm

The operating budget is currently running a deficit with no end in sight.

We have reserves but they are depleting and are expected to run out by 2021.

The purpose of Measure A (the largest school parcel tax in the state) was to make up the shortfall from what Sacramento provides.

In spite of Measure A we have experienced furlough days and cutbacks in teaching assistant hours.

[To see where the money is going \(click dollar signs to drill-down in Activity tab\)](#)

Measure A passed easily (by almost 80%) and will be up for renewal in 2020.

Will we need to increase the ask amount at the time of renewal?

Tags:

- [campaign](#)

Measures G and H survey update

From: Titan, Hari (hstitan@yahoo.com)
To: schoolboard@piedmont.k12.ca.us
Date: Tuesday, October 15, 2019 at 10:14 PM PDT

Dear School Board,

So far at least 250 people have downloaded my "YES on G and H" presentation.

Of those, 15 have filled out my follow-up survey so far, see attachment.

This response rate is obviously is rather low. However I've had good (+/- 5%) predictions even with very low response rates from this email list in the past.

As expected, Measure G shows stronger support than Measure H.

Support for Measure H appears to be very close to what's needed for passage. The "maybe" category seems interesting in that pushing for a higher voter turnout might force a decision which might help convert some of the "maybe" folks to yes votes.

The good news is that the time I spent creating the presentation and sharing it with folks appears to be effective:

- Over 50% felt my presentation added some value and may help with certainty and therefore voter turnout.
- It may have also changed some votes in the positive and "maybe" directions.

Hari



Measures G and H Survey.pdf
218.3kB



Parents for Educational Excellence in Piedmont <excellencepusd@gmail.com>

possibility of a teacher's strike

7 messages

Parents for Educational Excellence in Piedmont <excellencepusd@gmail.com>
To: Jennifer Hawn <jhawn@piedmont.k12.ca.us>

Wed, Jan 24, 2024 at 9:14 PM

Hi Jennifer,

I noticed the APT union voted 96% in favor of a strike subject to the mediation and potential fact-finding report failing to provide a settlement. They conveniently did this vote after the parent / PEF Giving Campaign was over.

Given the ultra-high vote percentage, it seems the teachers are telling their union executives to not back down.

It is very unfortunate that the PUSD admin team and the APT executives cannot arrive at a "meeting of the minds", essentially a common understanding. The union is demanding solutions that they don't have and the office of the CFO is unable to provide a meaningful analysis of the state of the budget that is easily digestible for teachers and their union.

PUSD needs better thought leadership and analytical prowess on the school board and office of the CFO. Typically that kind of explanatory leadership is seen among top researchers who typically have a Ph.D. in an analytical field.

During the 2020-21 school year, much was made of the quality of distance learning at PUSD. In review of parent emails to the district that I obtained from a CPRA request, I noticed that high-needs students suffered the most from distance learning. It would be a shame if the special ed teachers joined the hypothetical / possible strike.

This brings me to the question of whether the impact of a strike can be reduced with a distance learning backup plan. This leads to a few questions:

1. Would a (t)k-12 distance learning provider allow a sudden mid-semester enrollment of nearly 2400 students?
2. Would such a provider allow this enrollment to happen during a teachers union strike?
3. What providers are known for their quality and accreditations (e.g. WASC)?
4. Since the district is on the hook for APT salaries during the strike, are any of these providers low-tuition or tuition free?

A quick Google search revealed:

Tuition-free providers

[California Connections Academy](#)

[California Virtual Academies](#)

[Khan Academy \(is donation based with a paid AI tutor option\)](#)

[CK-12 \(similar to Khan Academy\)](#)

Private online schools (w/ high tuition, affordable by some parents)

[Stanford Online High School](#)

[UC Scouts \(High School\)](#)

[ATDP \(primary and secondary, in-person and online\)](#)

Out of state (accredited, unknown tuition, open to fill staffing shortages)

[ImagineLearning \(formerly Edgenuity\)](#)

Former superintendent Randy Booker had done an analysis of such providers and ended up with Edgenuity as his choice back in November, 2020. Although the costs for (now named) ImagineLearning might be affordable for PUSD, I suspect many parents would be alarmed by the lack of reputation for this provider.

If deeper cuts are required, decommissioning and laying off highly paid Assistant XYZ (e.g. Assistant Principals) and non-essential Director level positions might be in order.

Just food for thought.

Good luck.

Hari Titan

Parents for Educational Excellence in Piedmont <excellencepusd@gmail.com>
To: Sylvia Eggert <seggert@piedmont.k12.ca.us>

Thu, Jan 25, 2024 at 5:24 PM

FYI

[Quoted text hidden]

Jennifer Hawn <jhawn@piedmont.k12.ca.us>
To: Parents for Educational Excellence in Piedmont <excellencepusd@gmail.com>

Thu, Jan 25, 2024 at 7:57 PM

Hi Hari,

Apologies for the delayed response~ We have been focused on budget cuts, including a Board study session today, which has taken up most of my time. I have asked Sylvia to schedule a meeting so that we can discuss ideas in person, which would be helpful to me if you have the time. Because many of your ideas are curriculum-focused, I have asked Ariel to join us.

Thank you for your wisdom; I really do need all the best ideas right now (I suppose, always), and I appreciate that you have taken the time to offer creative solutions.

I look forward to our conversation,
Jennifer



Jennifer Hawn, Ed.D.
Superintendent
Piedmont Unified School District
(510) 594-2614 - Office

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[Quoted text hidden]

Parents for Educational Excellence in Piedmont <excellencepusd@gmail.com>
To: Jennifer Hawn <jhawn@piedmont.k12.ca.us>
Cc: Hari Titan <hstitan@yahoo.com>

Mon, Jan 29, 2024 at 8:51 PM

Dear Jenn.

I'm on your calendar next week Monday, Feb 5. We'll meet on Google Meet. I'm looking forward to it.

I looked back and found Randy Booker's criteria for online education buried in a document that is no longer live:

Distance Learning Models (models TBD based on student choice and continued planning with staff):

- 6-12 "Virtual Academy" Classes
Students in a 6th-12th grade "virtual academy" course would receive the bulk of instruction in a variety of courses using an Edgenuity product "Courseware". These courses are standards-based, UC/CSU A-G approved, and also NCAA compliant. The courses can be customized to align content topics to match the syllabus topics of traditional PHS/MHS/PMS courses.

Students would be supported daily by certificated educators to monitor progress, ensure active note-taking and reflection, unlock and grade assessments/projects, and support socio-emotional needs. With a variety of course needs, the facilitating teacher may not be an expert in the course materials, so as an additional support, course specific live tutors are available on the platform.

1. Standards-based
2. UC/CSU A-G approved
3. NCAA compliant

If we are using an online school for short-term coverage during a teacher's strike, I don't know if #3 is all that important.

If it is true that teachers don't get paid during a strike, I actually started worrying about the teachers doing a random 1-day strike every once in a while during the school year.

In that situation I don't see substitute teachers or the idea of temporary online schooling making a difference since the transition period is so short. In such a scenario, we need to insist the teachers make up the lost teaching days at the end of the year. We already have demonstrated "learning loss" from Covid-19 that lasted years afterwards. We don't want more "learning loss" from multiple super short strikes.

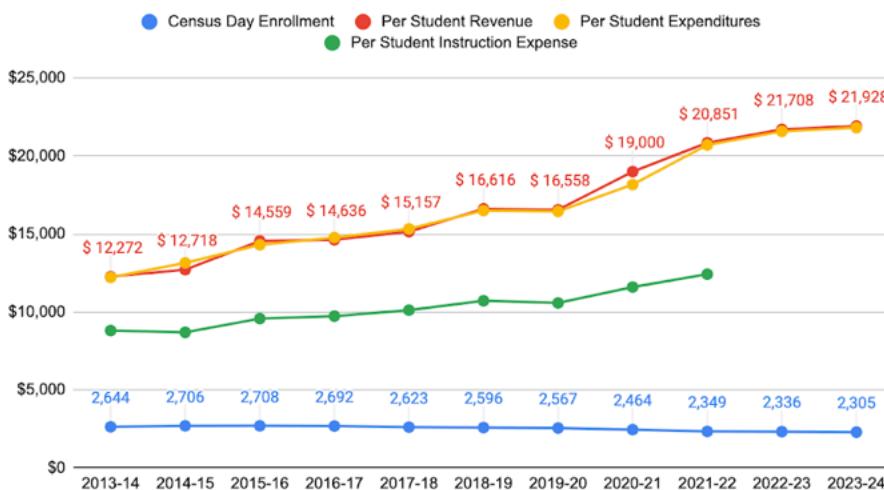
On a separate point. Jeff Camp (who runs ed100.org and lives in Piedmont) and Carol Kocivar (who was a former leader of the California PTA) did an analysis concluding that year-over-year funding has not been negatively impacted by enrollment declines for the entire State of California, see here: <https://ed100.org/blog/budget-24-25>

I decided to assemble or "compile" some PUSD financial data and see if this same trend holds for us: <https://docs.google.com/spreadsheets/d/1FaZsI09ZK54aI5L7E51BU9BOt-DiVonyPhA8RyCOSZw/edit#gid=0>

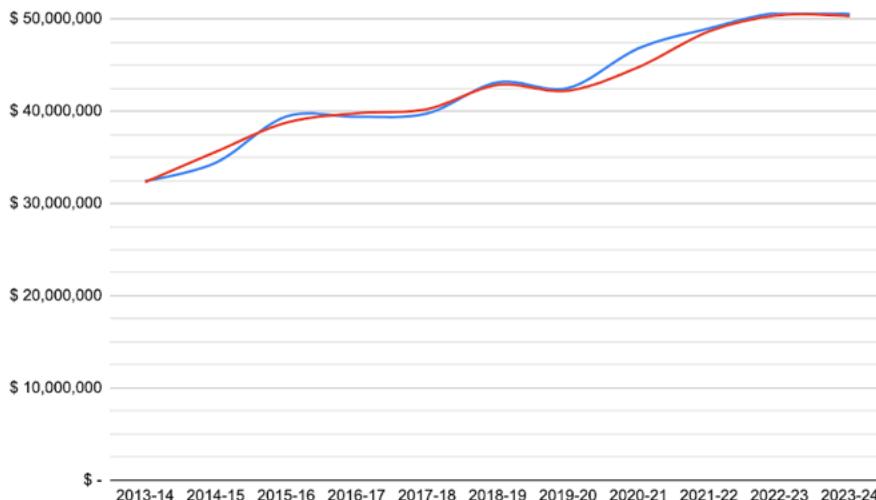
My conclusion is yes. However I'd like confirmation from Ruth on this point.

Below are a couple of charts from that analysis:

Piedmont Unified (PEEP assembled data)



TOTAL Revenue — TOTAL Expenditures



The second chart shows that the total revenue (including everything: Federal, State, Prop tax, Parcel tax, Giving Campaign, Direct giving etc.) has mostly gone up over the years in PUSD and now is over \$50 million.

The first chart shows that the combined per student funding has gone up each year (with the exception of 2019-20) and now is close to \$22,000 per student. The per student increases are large enough to offset the declining student

enrollment, and combined with the 2nd chart actually increase total district funding.

With declining student enrollment, fixed property plus parcel taxes actually end up contributing more per student in a declining student population district. PEF has brought in well over \$3M each year in the past 4-5 years and in a declining student district PEF donations, when divided by a smaller student body, contribute more per student last year than prior years. Student enrollment is also independent of the state tax revenue. Camp and Kocivar explain that Prop 98 legislation allows the state to ignore student enrollment and pay out based only on the state's general tax revenue. A declining student population but increasing state funding means more state funding per student.

Per-pupil funding changes this year

Ready for something nerdy? Enrollment in California public schools is declining in 2024-25, but the decrease doesn't trigger a decrease in state funding. Here's why.

The Prop. 98 funding guarantee has three different tests to determine the level of required funding for public education. Two of those tests look at projected revenues in combination with projected enrollment. But a third test is based only on general fund revenue. This year the budget calculations use that test because it yields more funding. Thus, the percentage of General Fund revenues is not reduced to reflect declining enrollment, which increases per pupil funding.

Yes, it's complicated. And also: Yippee? Or Whew, at least?

Jeff Camp and Carol Kocivar

<https://ed100.org/blog/budget-24-25>

I chose the data which was easiest to obtain (e.g. census day enrollment) and financial data available on Ed-Data.org (see all references in my spreadsheet).

I think this point is important. If Ruth can validate this conclusion, we can remove the issue of student enrollment as an excuse for not being able to meet the APT demands. Clearing up this misunderstanding would free up a better analysis of the budget which would help refine what non-essential elements can be cut.

I hope the school board can give you carte blanche approval to investigate ways to meet the APT demands. I think the possibility of a strike is going to cause more academic harm to students and should be avoided if possible. Cuts can be undone when revenues go up in the future. Learning loss can't easily be undone.

Sincerely,

Hari

[Quoted text hidden]

Jennifer Hawn <jhawn@piedmont.k12.ca.us>

Tue, Jan 30, 2024 at 8:25 AM

To: Parents for Educational Excellence in Piedmont <excellencepusd@gmail.com>

Well, as usual, I agree with almost all of your points, especially the urgent need to avoid a strike if at all possible. I will check with Ruth about your enrollment analysis. \

Thanks for your thinking on this matter. I need all the help I can get right now.
Jennifer



Jennifer Hawn, Ed.D.
Superintendent
Piedmont Unified School District
(510) 594-2614 - Office

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[Quoted text hidden]

To: Jennifer Hawn <jhawn@piedmont.k12.ca.us>

Hi Jennifer,

It seems like the PUSD administration (including school board) and APT are on much better terms and worked together on the mini-rightsizing cuts as well as the public survey on a parcel tax hike. I also heard something about delays in getting the state overseer to review district finances. Any idea when that report will become available?

In the meantime, I thought the idea of independent study using online classes and resources is not just for a long-strike scenario (which I am no longer fearful of). The idea could be used to increase district revenue as soon as next year.

Over the years I have interviewed a few ALPS leaders (including Michael Malone) and pieced together an opportunity for the district to get more students. Specifically, gifted and talented (GATE) students.

The following needs to be verified using PUSD's internal emails/documents. However my understanding is that:

1. In or around 2014, state funding for a special education program for GATE students was eliminated.
2. The loss of this program disproportionately impacted PUSD because a much higher proportion of Piedmont kids passed the OLSAT test compared to the rest of the nation. When the cutoff was the top 96th percentile, it was reported that 30% [?] of Piedmont students passed the test (as compared to 4% nationwide). Later the cutoff was changed to 98th percentile and that dropped the number to 10% [?] of Piedmont students passing (compared to 2% nationwide). With either cutoff, that's a lot of students impacted.
3. PEF has not tried to fundraise for a replacement program and it just might not fundraise well.
4. Over time, according to Michael, many of these students decided to leave PUSD for private school or homeschooling.
5. This is likely while maintaining their Piedmont residences. In other words, the kids are still local and the parents could be incentivized to change their mind.
6. PUSD could create an independent study program based on supervised homeschooling where a special educator, specializing in the subject the student is most gifted in, would monitor a GATE student's progress and proctor exams to ensure grade progression. Ideally the special educator needs to be someone who can answer the GATE student's questions, not just refer them to online resources.
7. If this new program follows some established syllabus / curriculum, it would help sell the program to GATE parents who might have been disappointed with general educational programs at PUSD, although differentiated, and need a new (solid) hope to return their kids to PUSD.
8. I suspect GATE students would be most successful with the new AI tutoring opportunities in the marketplace. The reason is that these technologies require the user to formulate the next followup question, which is the essence of intelligence. Answering the question correctly requires knowledge and unfortunately many AI tools will be subject to hallucinations and are limited to high-school level answers. There are ways to mitigate the hallucinations and some tools go beyond HS level answers. I'm sure the teachers are being exposed to these options on their professional development day and the ALPS math enrichment trial program might inform how well the tools work.

I don't think the average student is going to benefit a lot from AI tools. This article shines some light on this: <https://www.timeshighereducation.com/news/pen-and-paper-beats-computers-retaining-knowledge>

Student enrollment dropped 8.1% more than the rest of the state (6.7%) since 2014. I don't have an estimate of how many kids are being homeschooled or going to private school in Piedmont but there is a correlation with the impact on GATE students. I suspect it is hard to get an accurate estimate because many kids might not have bothered to enroll in PUSD in the first place given the declining university matriculation results pre-2018, followed by pandemic-era policies, followed by a racial/sexual DEIB-focus.

There was supposed to be a movie about GATE students that got stuck in post-production. It's called "G Word". I have a link to a trailer here which suggests it might be putting GATE students in the context of DEIB more broadly: <https://vimeo.com/170177625>

I do recall that the demand for private schools went through the roof after the pandemic. I suspect new GATE students are competing with a lot more students to get into those few programs (Bentley, CPS, Head-Royce) and they might be open to a new program offered by PUSD.

Hari

[Quoted text hidden]

Jennifer Hawn <jhawn@piedmont.k12.ca.us>
To: Parents for Educational Excellence in Piedmont <excellencepusd@gmail.com>

Tue, Mar 12, 2024 at 8:47 AM

Thanks, Hari. I always appreciate your thinking about innovation in education. I had not thought about independent study for GATE students, and so I will advise Ariel to explore this option. Ruth is the keeper of the financial and enrollment information, and so I will get together with her for this information. Currently, we are exploring independent study for high school students, basing our model on other districts where I have worked (i.e., Beverly Hills USD) where robust hybrid independent study programs are offered and in very high demand. My hope is that we can fill a gap in our program and that we can increase our enrollment, starting with high school and possibly other grades in the future.

More to come, and thank you for your ideas.

Gratefully,
Jen



Jennifer Hawn, Ed.D.
Superintendent
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(510) 594-2614 - Office

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[Quoted text hidden]

Rightsizing is the right thing to do

From: Titan, Hari (hstitan@yahoo.com)
To: schoolboard@piedmont.k12.ca.us; jhawn@piedmont.k12.ca.us
Date: Tuesday, February 27, 2024 at 11:42 PM PST

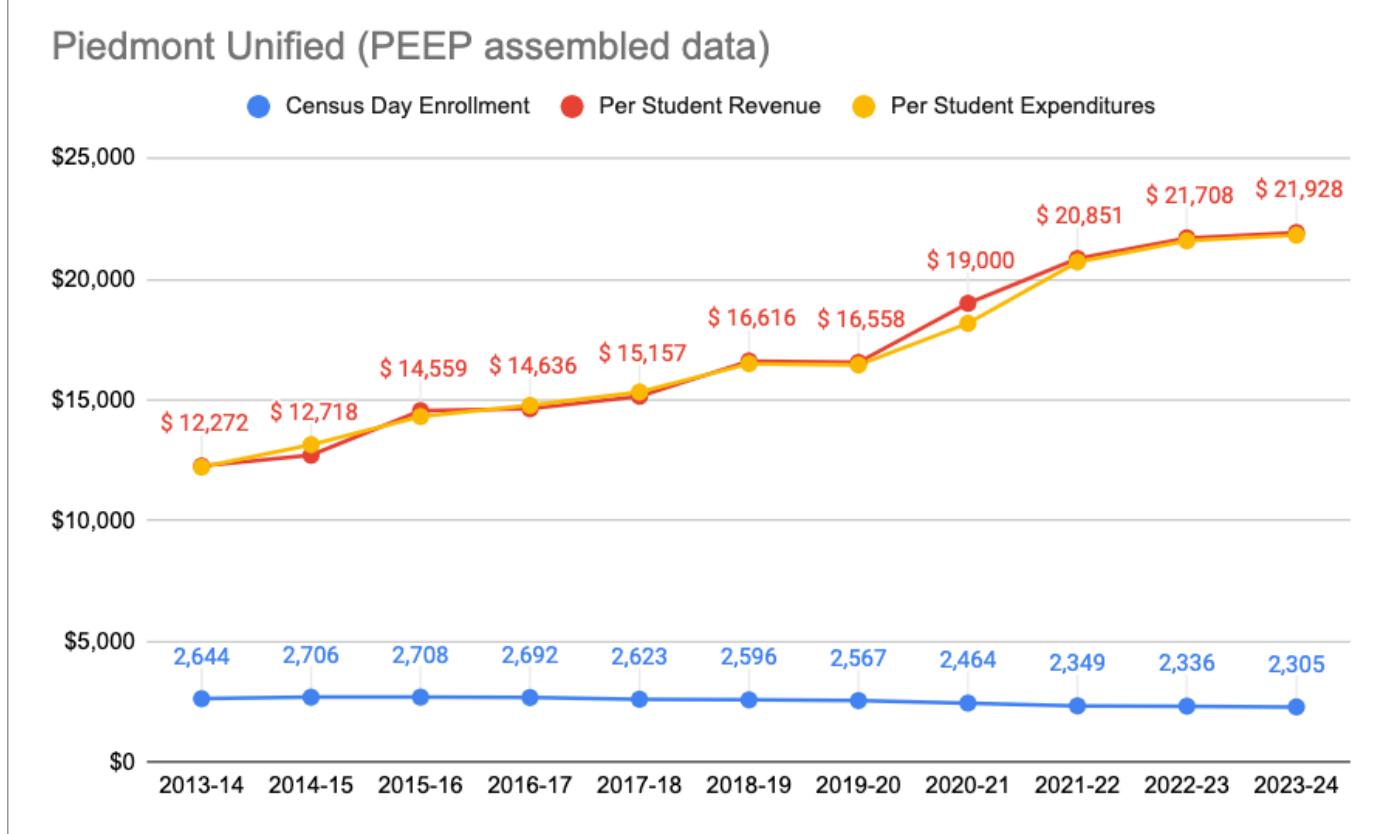
Dear School Board and Superintendent Hawn,

In response to declining student enrollment published in the Piedmont Post on Dec. 20th, APT threats of a strike, and Ruth's January 11, 2024 presentation that outlined ways to make rightsizing cuts, I decided to look into these myself. I analyzed past budgets and county and state-level student enrollment trends. You can see the raw tables from my work at bit.ly/PUSDBudget. I presented this to Dr. Hawn and Mr. Dolowich. Ruth Alahydoian commented on one part of my analysis, see forwarded email at the bottom of this email.

I request you remove the Measure H tax hike and ensure passage of the rightsizing cuts proposal as soon as possible.

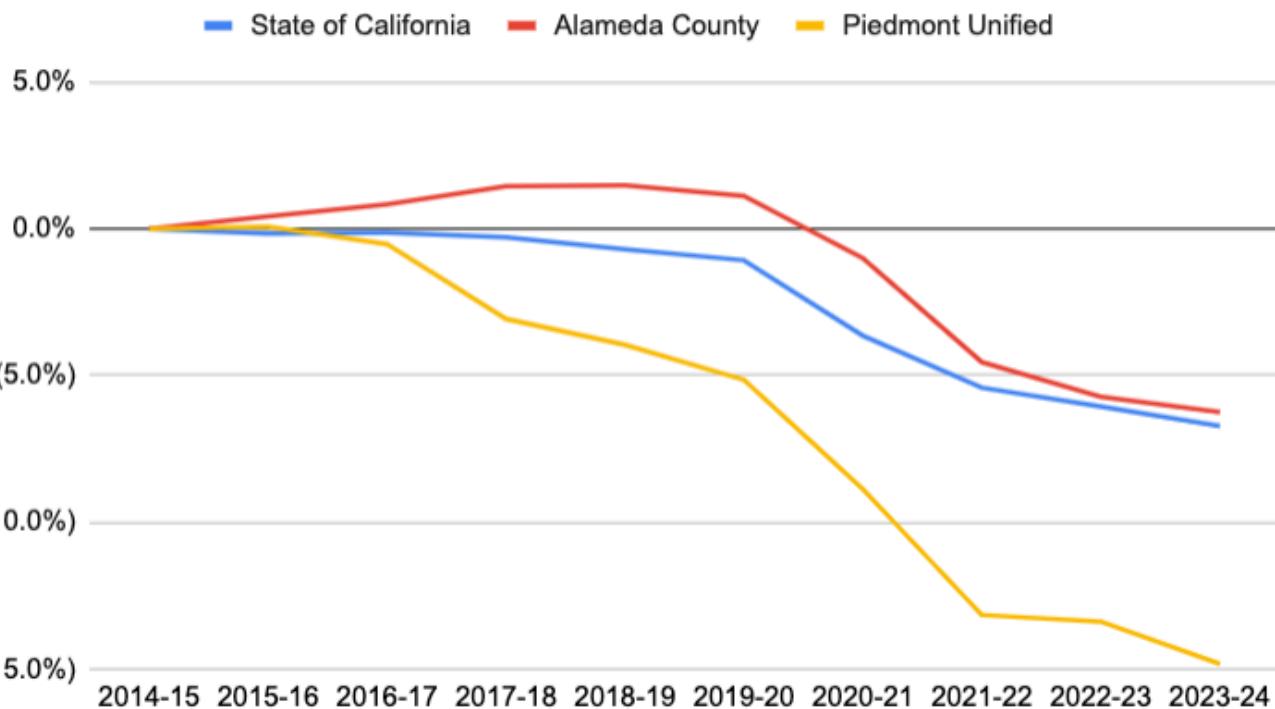
My opinion is based on my analyses. Below are some highlights.

1. Total Revenue per student increased dramatically, canceling out most (not all) of the impact of declining student enrollment



2. K12 enrollment decline is a phenomenon in the western world ([incl. China, Russia, Europe, US, Canada, Argentina, Brazil...](#)) and can now be seen throughout California. PUSD declined 8% more than the average state decline.

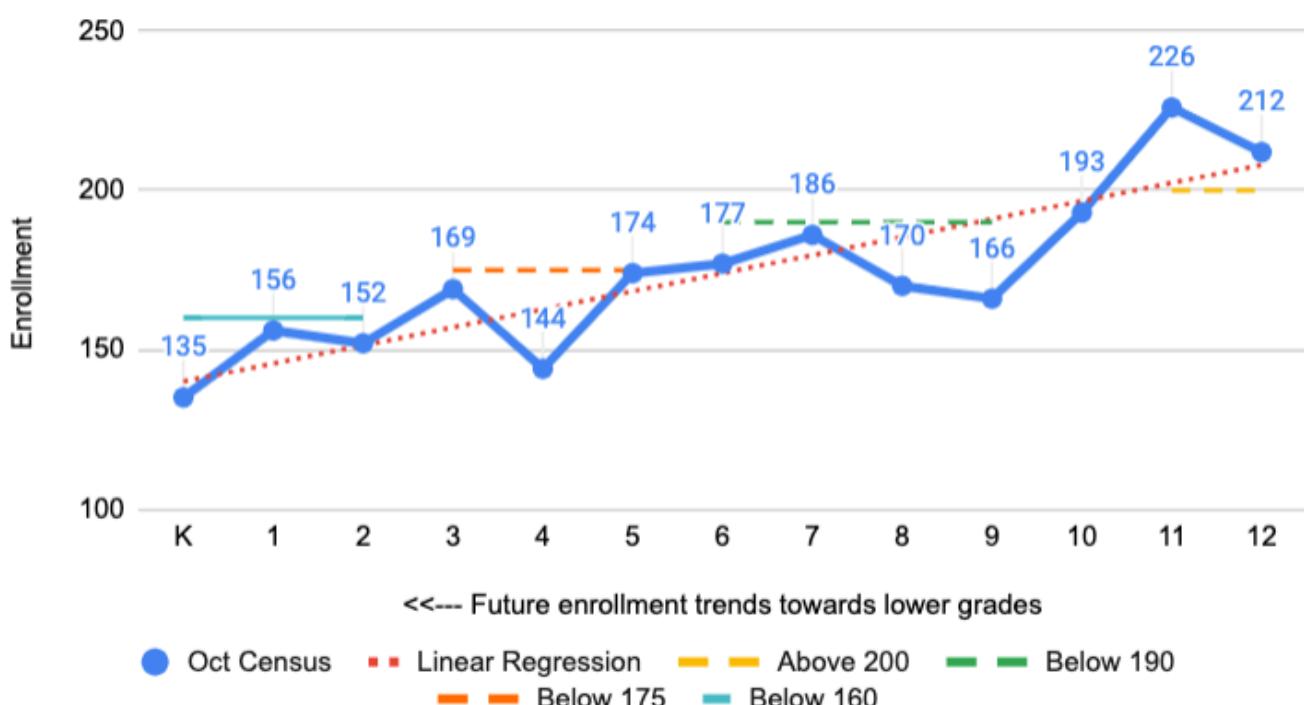
K12 Cumulative Change in Enrollment since 2014



Student enrollment has been going down due to A) a declining birth rate, B) increased expense for families to move to Piedmont, C) families that can afford private school, and D) empty-nesters who remain in Piedmont.

3. This enrollment decline is not temporary and is projected to continue.

2023 PUSD Enrollment w/ Trend suggesting continued decline



HT: The enrollment decline is not temporary and the trend suggests it will continue

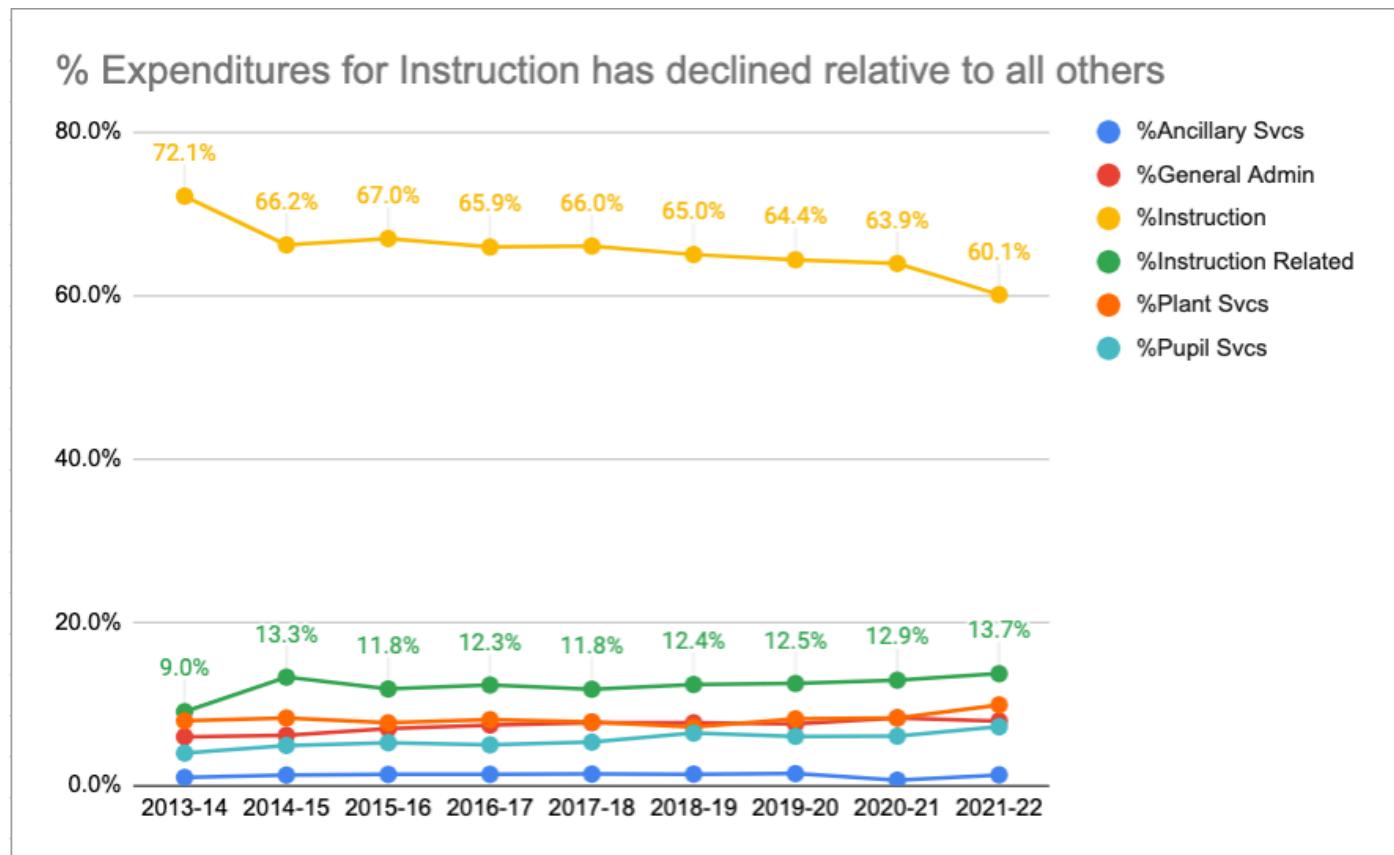
12th and 11th grades are well above 200 students, middle school grades are below 190, elementary grades below 175, with 1st and 2nd grades below 160 and the Kindergarten class at 135 students.

This presentation is similar to how Ruth presented it.

Note I have a regression trend line which is sloped down and to the right. This is another way to get a future enrollment trend. We can hope that it doesn't remain linear and somehow levels off before possibly coming back up a bit. However hoping is not what we need to plan for.

The enrollment decline is not temporary and the trend suggests it will continue. Educators and administration need to adapt to this new reality.

4. It's not the fault of the teachers that COLA has been hard to achieve over the past decade. PEF donor / parent requests for non-academic expenditures have taken away from the teacher's share of district expenditures.



The accounting category of "Instruction" that likely includes teachers salaries and benefits used to command 72% of the district expenses back in SY 2013-14. It fell to 60% in 2021-22. Every other not-Instruction category increased their share of district expenditures.

5. Teachers have losing out to inflation in part because of the faster rise of other departments.

Compounded Annual Growth Rates (CAGR)	
Ancillary Services	9.0%
General Administration	9.0%
Instruction	2.9%
Instruction Related Services	10.8%
Plant Services	8.2%
Pupil Services	13.3%
TOTAL Expenditures	5.2%

Overall expenses grew on average 5.2% compounded each year from 2013-21. In contrast, the "Instruction" category only grew by 2.9% compounded, while "Instruction-related" grew 10.8% compounded, "Pupil Services" grew 13.3% compounded, "General Administration" and "Ancillary Services" grew 9% compounded, and finally "Plant Services" grew 8.2% compounded.

Further investigation is needed to see what could be cut from these categories in the hopes of preserving as much core academics as possible.

I did see this chart in Ruth's presentation which might breakdown "Pupil Services" a bit:

WHAT DOES \$1.4 M LOOK LIKE?

Another way to consider the district budget is by program. The following list is for purposes of providing examples of programs and is not a recommendation for cuts.

Program / Expense	Unrestricted (includes Parcel Taxes & PEF Grant)	Parent Contributions	Restricted Grant	Total
Athletics	\$418,933	\$278,594	\$73,598	\$771,125
Wellness Center	161,326	63,089	60,149	284,564
Libraries	773,918	24,602	0	798,520
Arts Program	1,439,403	88,990	0	1,528,393
Counseling (K-12)	979,465	86,026	0	1,065,491
DEIB	182,702	0	196,158	378,860
Professional Development	158,567	5,354	6,665	170,586
IT Hardware - Chromebooks	145,700	19,970	0	165,670
IT Software	352,572	0	5,853	358,425
TOTAL	\$4,612,586	\$566,625	\$342,423	\$5,521,634

A similar breakdown should be done for the other non-academic accounting categories. Do "plant services" include HVAC? Are we turning off HVAC systems after the school day is over?

6. In Summary

We are lucky that state funding increased dramatically during the past decade and that helped offset a big portion of the decline in student enrollment.

Rightsizing is the right thing to do to get the rest of the way because we are serving fewer students and anticipating this trend will continue.

We should try to rightsize the non-Instruction departments more if possible. This will require more detailed reporting and analysis of how and why those departments grew so fast. Most parents would not be surprised to hear this. Any parcel tax increase would end up running into this non-academics perception problem.

The parcel taxes are already softening the blow of rightsizing because those revenues are locked in for up to 8 years independent of enrollment declines. Measure H was designated for educator retention and recruitment. At this point in time we need to facilitate educator departures, not retention. Periodically we had trouble recruiting Science teachers. I didn't see recruitment as much of a problem at this time either.

I don't see much of an appetite from parents for additional fundraising or tax increases. I briefly spoke to the guy who helped create Measure H and he said he would not support a tax hike and he 100% supports rightsizing. I think board members know who I'm talking about but I'd rather keep his name confidential.

I've attached an article I submitted to the Piedmont Post.

Hari

----- Forwarded Message -----

From: Ruth Alahydoian <ralahydoian@piedmont.k12.ca.us>
To: Titan, Hari <hstitan@yahoo.com>
Cc: Jennifer Hawn <jhawn@piedmont.k12.ca.us>
Sent: Wednesday, February 14, 2024 at 05:31:32 PM PST
Subject: Thoughts on State Funding of Education

Hi Hari,

Dr. Hawn forwarded your email to me with the information about the growth in per pupil funding and how that could offset the decline in enrollment. Thank you for

sharing the article and for your analysis. Here are a few of my thoughts.

Regarding the State's **Proposition 98** requirement, the article on ed100.org is in line with my understanding of Prop 98. The Prop 98 limit is not tied to # of pupils, so if the # of pupils decreases, the Prop 98 amount can be distributed among fewer pupils and should result in more per pupil. The challenge with linking this analysis to our situation is that PUSD is funded by the Local Control Funding Formula (LCFF), which is indirectly tied to Prop 98. LCFF is the per pupil formula that is increased by a cost of living adjustment (COLA) and used to determine how much basic funding goes to each district. The State uses Prop 98 to fund LCFF and all of the other State-funded educational programs, including their contribution to SPED, one-time funding, and other initiatives.

Theoretically, if the number of students has decreased, the Prop 98 funds can go further on a per pupil basis. However, if the increase owed to schools based on COLA is more than the increase in Prop 98, which is not based on COLA, the State has to determine how to make up the difference, which could involve a reduction to schools. The situation changes year to year, and this year (2023-34), with the tax deadline delayed and the revenues coming in less than expected, the Prop 98 limit is less than it was when the budget was approved. As a result, we could be subject to mid-year cuts. At this point, the Governor is considering various accounting gymnastics to not do that. The message for next year (2024-25) is don't expect to see much more from the State.

Regarding **PUSD's per pupil revenues**, yes, the revenues per pupil have increased steadily while the # of students has decreased. Please remember that our costs have increased as well, with raises to employees of 21% over the past five years. A significant portion of the increase in revenues over the past five years was tied to COVID relief funds and other one-time State funds. Most of those one-time revenues were used for COVID related expenses such as COVID testing for students and staff, additional technology to accommodate distance learning, improving ventilation systems, after school tutoring, and, for our most impacted special needs students, additional support after the return to school. Once you continue that revenue line out through 2023-24, you will see the per pupil amount stabilize and possibly come back down.

I think we are thinking along the same lines - fewer students across the state should mean more per student funding. My hope is that the State budget will provide some COLA for 2024-25. In any case, we as a District need to rightsize to our enrollment needs, and I am sure that is going to be painful for everyone. Thank you for your thoughts and for your support. Much appreciated!

Ruth Alahydoian
Chief Business Officer
Piedmont Unified School District
760 Magnolia Avenue
Piedmont, CA 94611
Desk: 510-594-2608
Fax: 510-654-7374



Rightsizing is the right thing to do.pdf
34.8kB

Re: PUSD PayPal, Venmo, or Zelle account

From: Jennifer Hawn (jhawn@piedmont.k12.ca.us)
To: hstitan@yahoo.com; ralahydoian@piedmont.k12.ca.us
Date: Wednesday, November 8, 2023 at 05:04 PM PST

Hi Hari,

Good to see your message--
I am adding Ruth to offer an update on the addition of Venmo (or one of the other direct online methods of payment). I like the idea!

Gratefully,
Jen



Jennifer Hawn, Ed.D.
Superintendent
Piedmont Unified School District
(510) 594-2614 - Office

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On Wed, Nov 8, 2023 at 4:36 PM Titan, Hari <hstitan@yahoo.com> wrote:

Hi Jenn,

Over the summer I was in conversation with Ruth Alahydoian about getting an electronic way to donate directly to the Piedmont Unified School District, without going through PEF or another charity/lobbyist. This avoids deductions for salaries and expenses of those organizations as well as avoiding conflicts of interest with the goals of a lobbyist.

I've been making donations directly to the district for a few years now but would prefer to not have to cut a physical check.

Ruth and I discussed a number of options including the district getting a PayPal or Venmo account for use to make donations.

Creating such an account takes minutes as long as it is tied to the appropriate district email address and bank account.

My understanding was that Ruth was looking into the possibility of creating one.

If there is such an account, could you please let me know?

Thank you.

Hari Titan

Re: Annual Registration opens at 9am August 1st

From: Titan, Hari (hstitan@yahoo.com)
To: ralahydoian@piedmont.k12.ca.us
Date: Sunday, December 3, 2023 at 04:48 PM PST

Hi Ruth,

I see we can now donate to PUSD via Infinite Campus (IC). That's great news!

The link appears to be: [https://piedmontca.infinitecampus.org/campus/store/piedmont/school-store/8/products\(secondaryRouteOutlet:product-view/230\)](https://piedmontca.infinitecampus.org/campus/store/piedmont/school-store/8/products(secondaryRouteOutlet:product-view/230))

Is there a shorter link that redirects to this link? There are services that can create those (e.g. tinyurl.com, bitly.com).

What fees does IC charge for handling a donation this way?

PayPal for charities [e.g. 501(c)(3) or a government agency] charges lower or no fees, especially when paying with a PayPal balance:

<https://www.paypal.com/us/cshelp/article/are-there-any-fees-charged-for-using-paypal-giving-fund-help207>
https://www.paypal.com/us/webapps/mpp/paypal-fees?locale.x=en_US#SendAndReceiveMoney

I'm still curious if you are planning to move forward with a PayPal or Venmo account for PUSD.

Thanks.

Hari Titan

(tel) 510.984.4674

On Tuesday, August 29, 2023 at 01:03:48 PM PDT, Ruth Alahydoian <ralahydoian@piedmont.k12.ca.us> wrote:

Hi Hari,

I don't want you to think that we are not working on this ... we are, and we hope to get a simple way for people to donate directly to the district soon. It involves our fiscal department and IC. At the moment, fiscal has prioritized closing the books. That should be complete in the next week. Once that's done, we will refocus on creating options for people to make direct donations to the District. Thank you for following up. I appreciate the nudge!

Ruth Alahydoian
Chief Business Officer
Piedmont Unified School District
760 Magnolia Avenue
Piedmont, CA 94611
Desk: 510-594-2608
Fax: 510-654-7374

On Mon, Aug 14, 2023 at 10:03 PM Titan, Hari <hstitan@yahoo.com> wrote:

Hi Ruth,

Is the district donation option ready for prime time?

Per our conversation, I thought PUSD will have an open-ended storefront inside Infinite Campus (IC).

I see a "District Store" in IC but there is nothing to pay for or no way to make a donation there.

<https://piedmontca.infinitecampus.org/campus/nav-wrapper/parent/portal/parent/school-store/8/categories>

We also discussed an alternative site that would accept PayPal and/or Venmo.

Let me know.

Thanks.

Hari

----- Forwarded Message -----

From: no-replies@piedmont.k12.ca.us <no-replies@piedmont.k12.ca.us>
To: "hstitan@yahoo.com" <hstitan@yahoo.com>
Sent: Tuesday, August 1, 2023 at 09:00:13 AM PDT
Subject: Annual Registration opens at 9am August 1st

A Message from Piedmont Unified School District

Welcome back! All families should complete the Annual Registration process before the start of school. Annual Registration collects updated emergency and health information, provides important notices, and facilitates donations in an easy two part mechanism.

Annual Registration Steps

Part 1: Infinite Campus

1. Log into the [InfiniteCampus Parent Portal](#) using your parent/guardian account
2. Follow the link to **Annual Registration** from the Announcements
3. PMS, PHS and MHS families:
 1. Purchase or donate to school-related items under the School Store module

Part 2: PiedmontStore.org

1. Visit the [PiedmontStore.org](#)
 1. Join parent and support clubs, student directories, swag, teachers gifts and other donations
 2. PMS and PHS families will pick a time slot for Walk-Through enrollment on Tuesday, August 8th

Need help with your Infinite Campus Parent Account? write ichelp@piedmont.k12.ca.us

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If you do not wish to receive these emails, please log in to your portal account at <https://piedmontca.infinitecampus.org/campus/portal/piedmont.jsp?> and update your contact preferences by removing "General".

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College Matriculation Analysis shows
unprecedented decline from 2007-2018

Re: PUSD College Enrollment Study

From: Titan, Hari (hstitan@yahoo.com)
To: rbooker@piedmont.k12.ca.us
Cc: seggert@piedmont.k12.ca.us
Date: Wednesday, January 9, 2019 at 05:08 PM PST

Hi Randy,

Attached is an update of the college entrance trend analysis that I am trying to produce. I think we had a very productive meeting regarding this last month and many of your thoughts and comments were incorporated into it. Let me know if I need to correct anything.

It turns out the Piedmont Highlander self-reported data included more than PHS for many years. On page 2, I created a new category of "Unreported" cases based on the discrepancy between DataQuest and self-reported data. For the students in my pool it appears I have responses for 92% of them. As per your request I am attaching the student names and response information I have for them. The file is password protected and I will verbally tell Sylvia the password since it shouldn't be emailed.

If possible I'd like to remove Millennium students from my study in the hopes of reducing the counts of "Unreported" and "Decline to State" cases. I'd also like to confirm the remaining are from PHS and find names of the unreported PHS graduates.

The only way I can do this is to match my data with student directory information. From the Annual Notice to Parents I saw this definition of PUSD's directory information:

The Piedmont Unified School District has designated the following information as directory information: Student's name; Address; Telephone listing; Electronic mail address (e-mail); Photograph used by the district for recognition of student achievement and community relations, including, but not limited to, publication in the district's or school's newsletters, yearbooks, in the school setting and on the district's or school's web site; Weight and height of members of athletic teams as needed; Grade level; School and dates of attendance; Degrees and awards received; Participation in officially recognized activities and sports, and; student ID number or other unique personal identifier that is displayed on a student ID badge, (but only if the identifier cannot be used to gain access to education records except when used in conjunction with one or more factors that authenticate the user's identity, such as a PIN, password, or other factor known or possessed only by the authorized user.)

I did not see any "Limited Directory Information Policy" as referenced by FERPA here: <https://studentprivacy.ed.gov/training/b-cs-student-directory-information>.

My understanding of FERPA is that as long as I don't request personally identifiable information (e.g. date-of-birth, SSN) and I am not asking for assessment reports, I may be entitled to student directory level information.

For the exclusive purpose of matching names to improve the quality of my study, I'd like to make a California Public Records Act request to get the highlighted student directory information (Student's name; Address; Telephone listing; Electronic mail address (email); Grade level; School and dates of attendance; Degrees and awards received;) for:

- 1) PHS students attending 12th grade in years 2007 through 2018.
- 2) Millennium students attending 12th grade in years 2007 through 2018.

If entitled to this information, I'd like it to be in electronic form.

I will share my final results with your office and the school board.

Let me know if this works.

Thanks.

Hari

From: Randall Booker <rbooker@piedmont.k12.ca.us>
To: "Titan, Hari" <hstitan@yahoo.com>
Cc: Sylvia Eggert <seggert@piedmont.k12.ca.us>
Sent: Wednesday, December 12, 2018 3:32 PM
Subject: PUSD College Enrollment

Mr. Titan,

I wanted to connect regarding your request for data regarding where our students have gone to college.

I understand that the Piedmont Highlander publishes this information based on student reporters connecting with members of the senior class. This, by law, is permitted because student reporters are in essence getting permission from each student responder to publish their info.

But from a District or site level, we are not permitted by law to publicly disclose where students have chosen to go to college (or if they're even going to college at all). This is considered privileged information under FERPA.

While I cannot release data related to individual students, I can share the [PHS School Profile](#) that indicates:

Percent of Students Attending a 4-Year College 89%
Percent of Students Attending a 2-Year College 6%
Percent of Students Taking a Gap Year 4%
Other 1%

The PHS School Profile also lists where students from the class of 2018 matriculated to (of those who chose to tell us).

I can say that the practice of students sharing where they are going to school is diminishing. More and more students are recognizing that where someone goes to college is not predictive of success or happiness, and thus don't want to share this info as a perceived badge of honor.

Here are several articles on the topic:

<https://www.reuters.com/article/us-column-weston-choice-idUSBREA4B09F20140512>

<http://time.com/5210848/prestigious-college-doesnt-matter/>

<https://www.wsj.com/articles/elite-colleges-dont-buy-happiness-for-graduates-1399349206>

<http://fortune.com/2015/03/23/college-admissions-ivy-league/>

Please let me know if I can help you in any other way or if you have any questions.

Rb

Randall Booker
Superintendent

"If we create a culture where every educator believes they need to improve, not because they are not good enough but because they can be even better, there is no limit to what we can achieve."

- Dylan William

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 Piedmont_Grad_College_Entrances.pdf
225.5kB

 college_study_hari.zip
28.2kB



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Matriculation Counts

Submitted by [Hari Titan](#) on Mon, 01/21/2019 - 10:58am

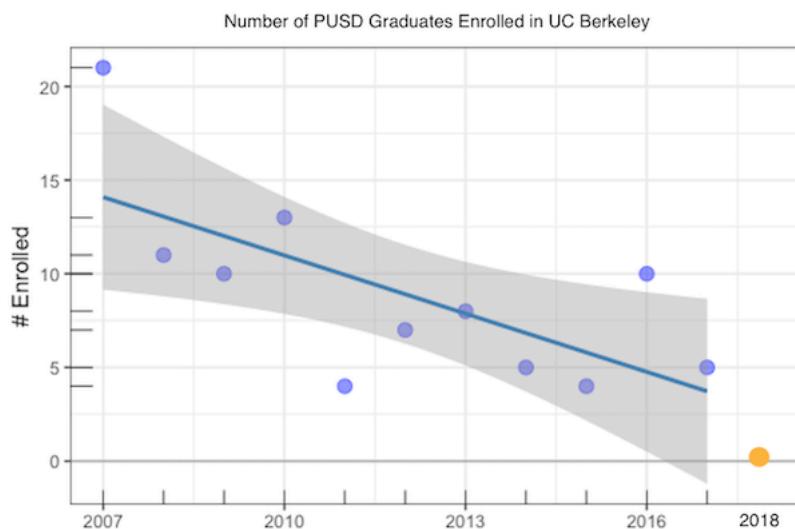
During my 2018 campaign I promised donors that in exchange for funding my campaign I would spend some time examining college entrance patterns for Piedmont grads.

The effort turned out to be exactly as difficult as I had imagined. The District did not provide data for my study but did review my findings and provided feedback on possible explanations (page 10 of my PDF). It took a lot of effort to coalesce data for graduating classes using 12 years of data from Piedmont Highlander voluntary surveys. College names had to be made consistent and there were a lot of missing values (Declined to State, Unreported, Undecided, and Gap Year). The Piedmont Post and I contacted parents to help reduce the unknowns and we now have 92% of the data available for aggregate study.

To read the study go ahead and download the PDF by clicking: [this link](#). No sign-up is required.

In this report, the colleges are listed in order of declining total enrollment (sum) over the past 12 years in both the charts and table sections. To keep the report manageable, colleges with fewer than 7 total enrollments from Piedmont grads over the same 12-year period are not reported. All trend lines have confidence bands displayed. Only a handful of trends appear statistically significant, see page 9 of the PDF.

One of these trend changes appears to be with UC Berkeley (aka "Cal"). While not a school for everyone, over the past 12 years Cal was the "mode" or most common college that PHS students went to. Over 11 years [2007-17], 98 Piedmont graduates enrolled in Cal and none enrolled in 2018.



Many people who read the Piedmont Post over the years sensed a change in enrollment patterns and some commented that coalescing that data for this study and providing trend findings (page 9 of PDF) has real value and could be a precursor to understanding why these changes have taken place.

The high school Wellness Center has approx 2000 complaints per year, the majority about academic performance. Has changing enrollment/acceptance patterns increased college applicant stress over 2007–18? If parents and students were aware of these changing patterns towards less academic/prestigious universities wouldn't that reduce applicant stress?

If you know (with links to evidence) why Piedmont grad enrollment patterns have changed significantly, please enter your comments (with those links) below or [contact me](#) directly.

My recommendation is that the PHS website should provide counts of Piedmont grads going to each college or college acceptance rates, preferably annually. Some nearby high schools provide similar data: [Head Royce 2013-17](#), [Head Royce 2016-21](#), [College Prep, Palo Alto](#), [Mission San Jose](#) and [Acalanes College Admissions Profile](#).

The district is about to receive a \$75,000 grant to enhance college readiness. Goal 2 of the district LCAP states that "All Students will Graduate with the 21st Century Learning Skills Needed for College and Careers." College entrances are a measure of college readiness in that both the college and the student feel they are ready to take on the course load and requirements for the college degree. The district should adopt college matriculation counts as a metric to track.

Feel free to contact the School Board [regarding this issue and send me a note](#).

2019 UPDATE

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The Piedmont Highlander newspaper decided to not ask graduating students for this information.

2020 UPDATE

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The data is very limited based on closures at most colleges and universities.

2021 UPDATE

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The Piedmont Highlander newspaper changed the question and we no longer have a consistent question that is being asked each year. The new question being asked is too broad and few students responded with their college plans. The results do not appear on their website: [TPHnews.com](#) in part due to COPPA.

This question should be standardized and asked every year by the College and Career Center and matriculation counts by college published as other high schools noted above do.

PHS tracks the success of graduates who entered one of a list of "Top 25 Institutions", see:

[PHS Top 25 Institutions by High School Class 2014-20](#)
[PHS Aggregate Report](#)

2022 UPDATE

=====

I just learned from our new PHS principal (Sukanya Goswami) that PHS does ask every senior which college they are planning to attend and the College and Career Center does compile matriculation counts by each college.

2023 UPDATE

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The Piedmont Post publishes the raw student survey level data, typically in the month of June. Remember this is a weekly paper that requires a subscription to get 75% of the news. The free "all city" version is monthly.

Class of 2019 College Matriculation: TPH decided not to ask graduates this question.

Class of 2020 College Matriculation: June 24, 2020, page 15.

Class of 2021 College Matriculation: June 16, 2021, page 7.

Class of 2022 College Matriculation: ???

Class of 2023 College Matriculation: June 7, 2023, page 7.

Tags:

- [STEM](#)

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[Best](#) [Newest](#) [Oldest](#)**Hari Titan**

5 years ago edited

PHS has updated their matriculation data for 2019 here: <http://www.piedmont.k12.ca....>

At least one 2019 graduate has gone on to UC Berkeley.

The district uses college application data students enter into a software program called Naviance and then aggregates mutual acceptance responses to produce their college matriculation report. At this point in time the District's matriculation report does not report the counts of students going to various colleges although the data is in the Naviance system.

The Piedmont Highlander (TPH) newspaper used to conduct an independent college entrance survey of students that allowed counts to be aggregated and was the basis for my report. However TPH has recently decided to stop conducting their college entrance survey so it is not easy to update my report for 2019.

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Graduates of Piedmont Unified School District, Piedmont, CA

College Entrance Trend Analysis

December 27, 2018

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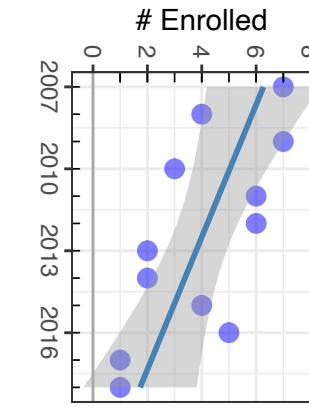
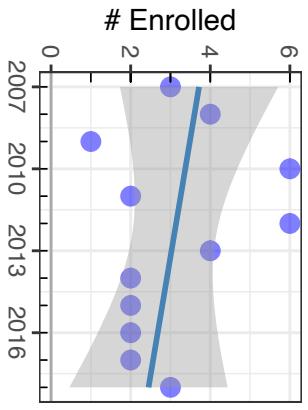
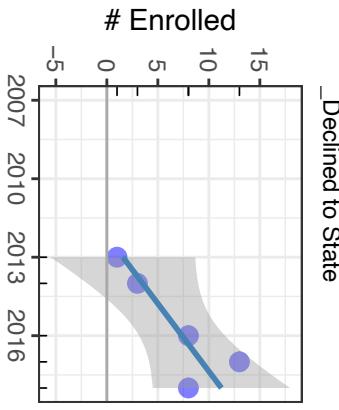
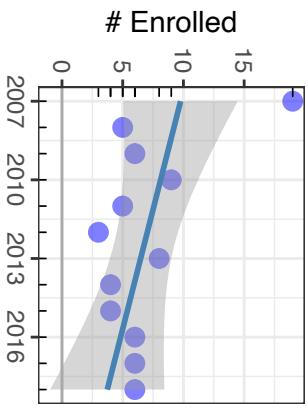
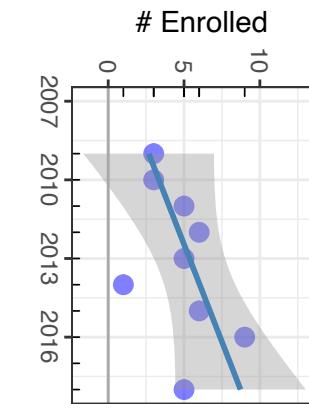
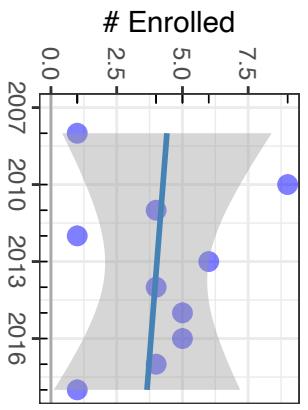
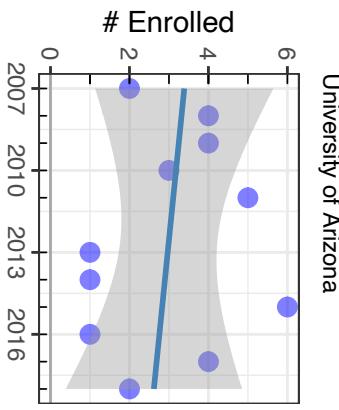
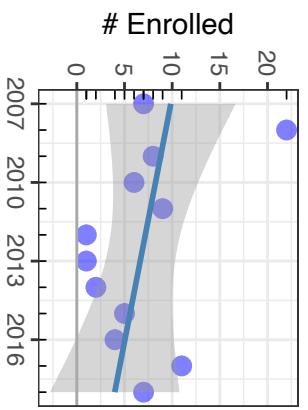
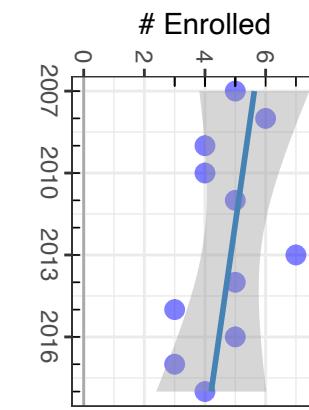
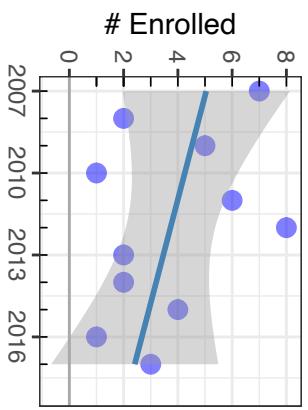
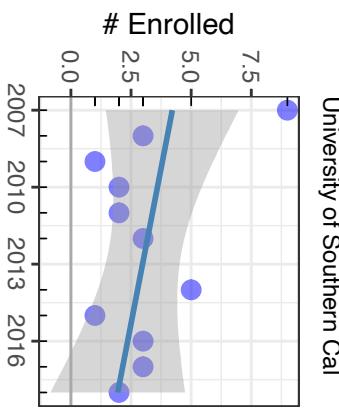
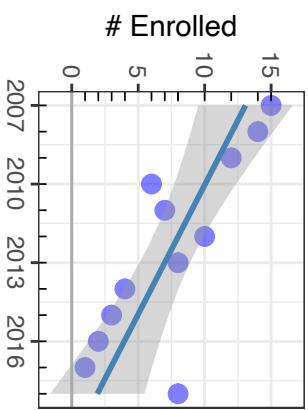
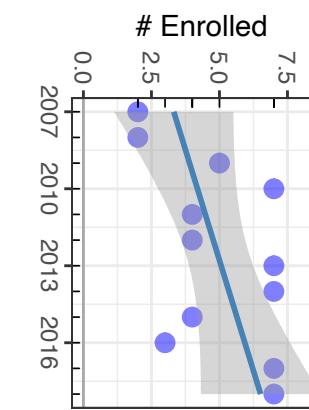
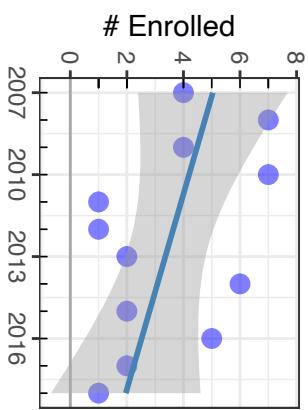
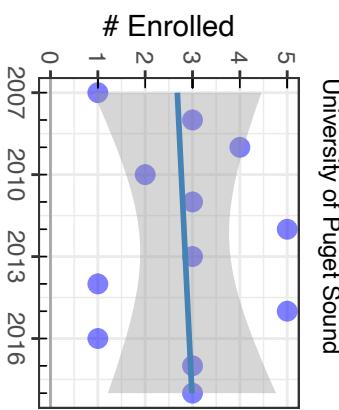
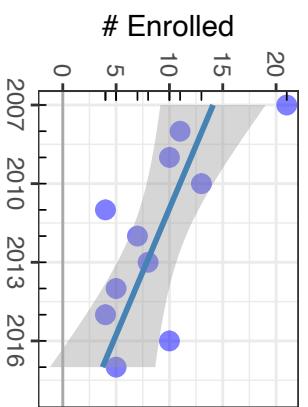
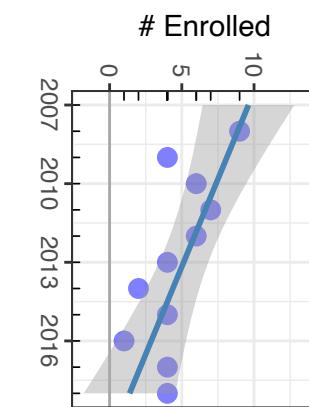
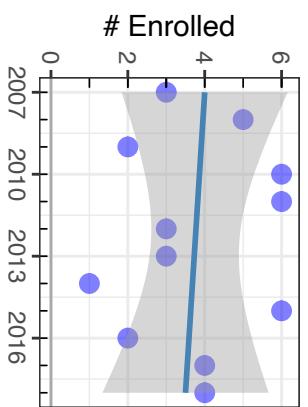
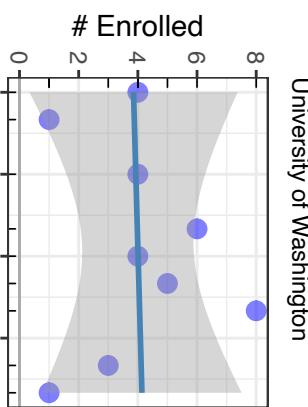
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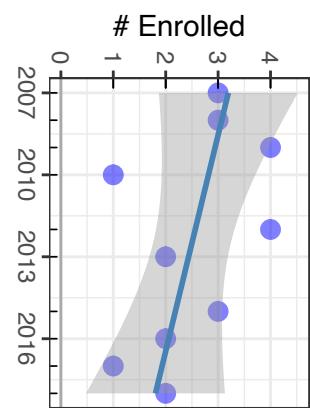
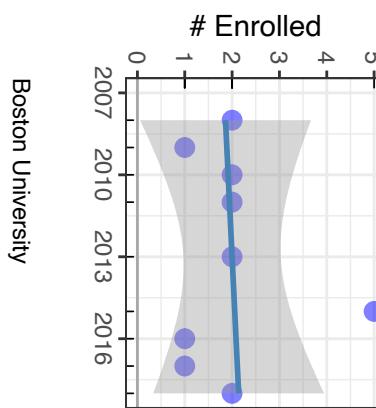
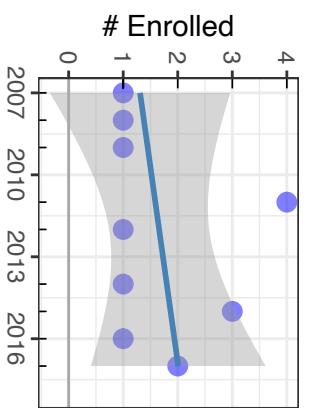
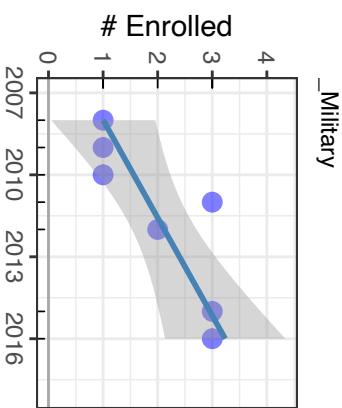
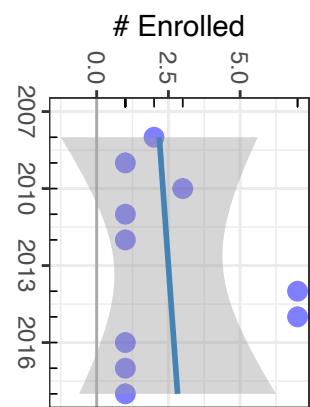
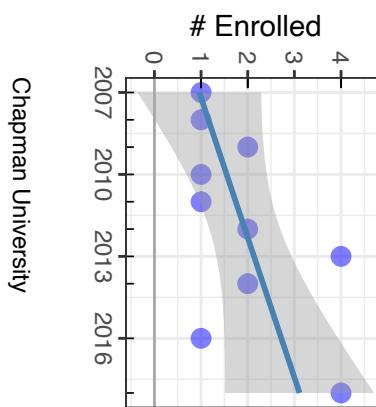
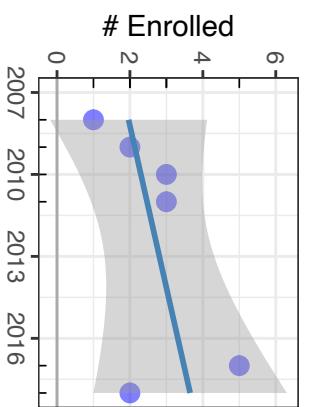
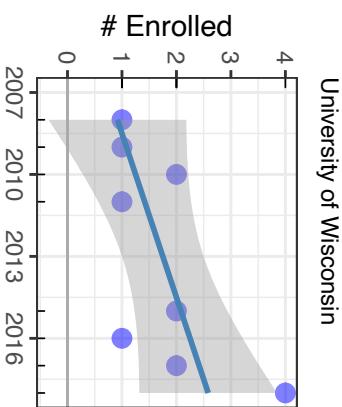
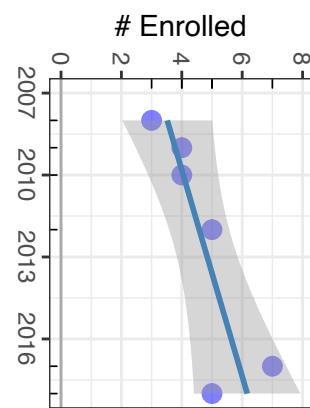
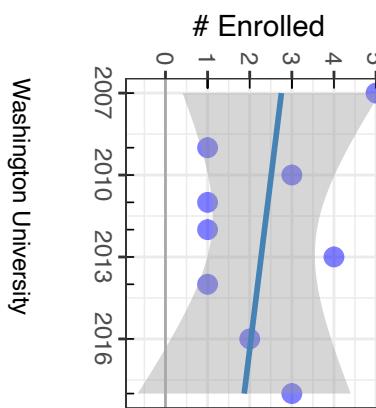
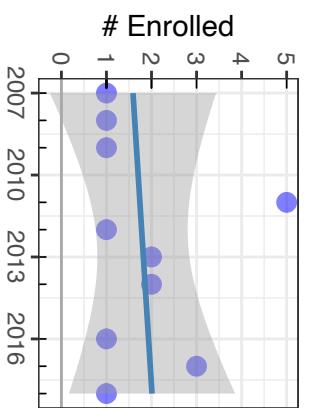
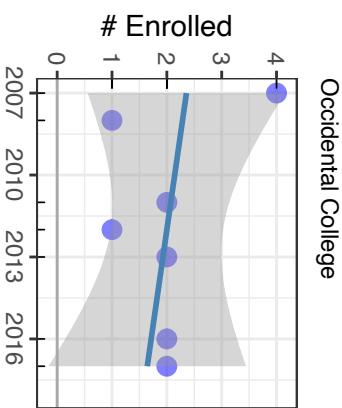
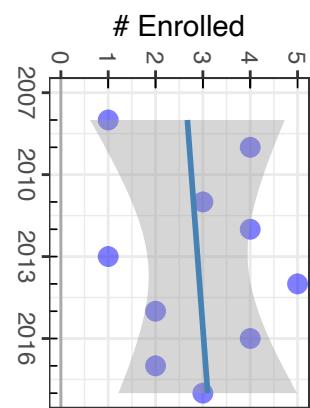
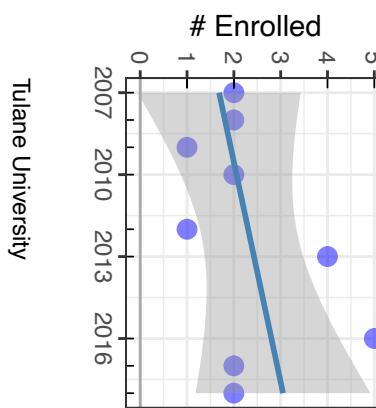
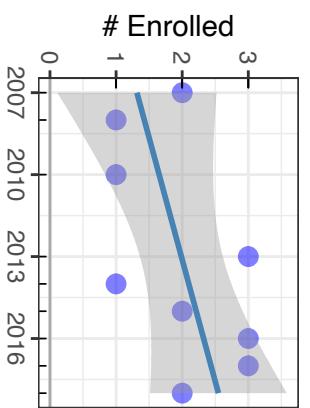
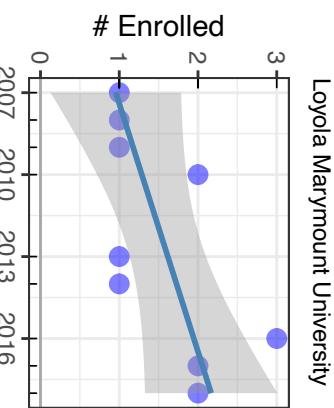
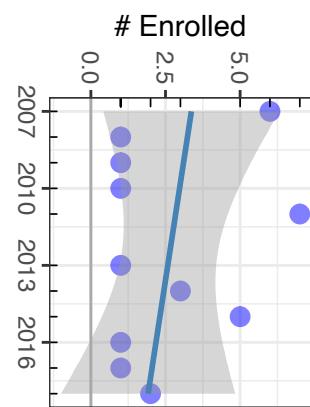
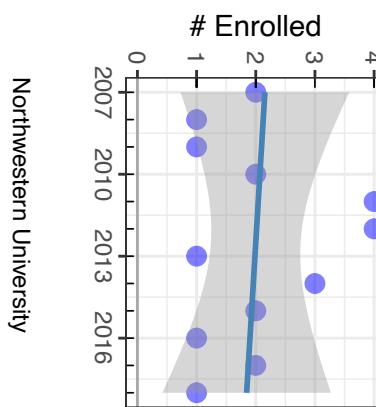
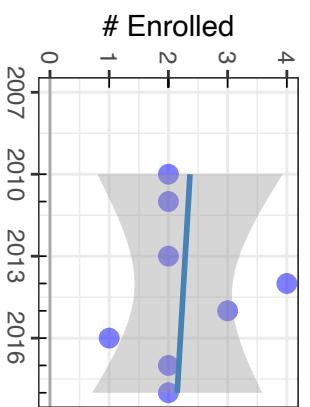
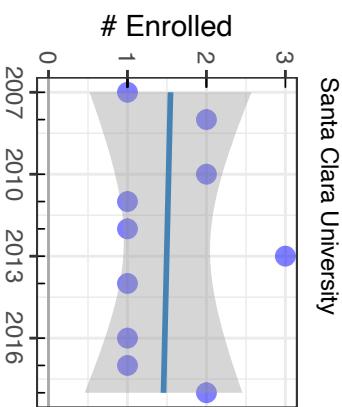
Year	PUSD Graduates	Respondents	Unreported	# in college	Declined to state	Undecided	Gap year	Work	Military
2007	226	224	2	224	0	0	0	0	0
2008	214	201	13	197	0	3	0	0	1
2009	183	183	0	175	0	4	3	0	1
2010	224	224	0	216	0	4	3	0	1
2011	220	211	9	203	0	0	5	0	3
2012	199	176	23	163	0	5	6	0	2
2013	206	195	11	189	1	0	5	0	0
2014	191	175	16	171	3	0	1	0	0
2015	227	215	12	205	0	0	6	1	3
2016	209	199	10	176	8	0	9	3	3
2017	225	220	5	184	13	7	14	2	0
2018	NA	198	NA	178	8	5	5	2	0

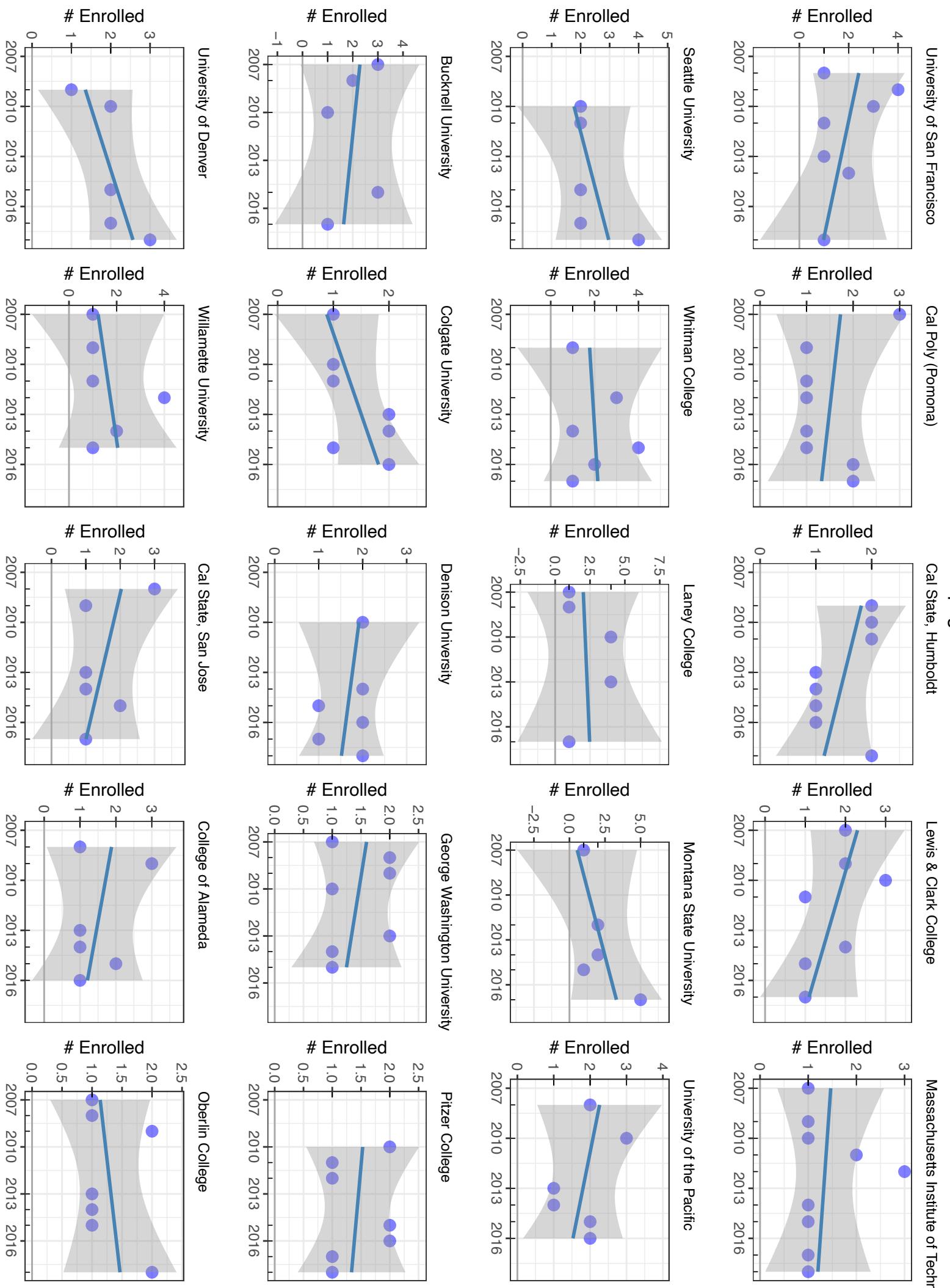
Sources: Count of PHS + Millennium Graduates obtained from the California Department of Education (<https://dq.cde.ca.gov/dataquest/>)
 2007–18 Self-reported Lists published in the Piedmont Highlander & Piedmont Post, recently amended with updates from parents & guardians.
 2007–09 Graduates for PHS only.

Enrollment Trend Lines

UC Berkeley







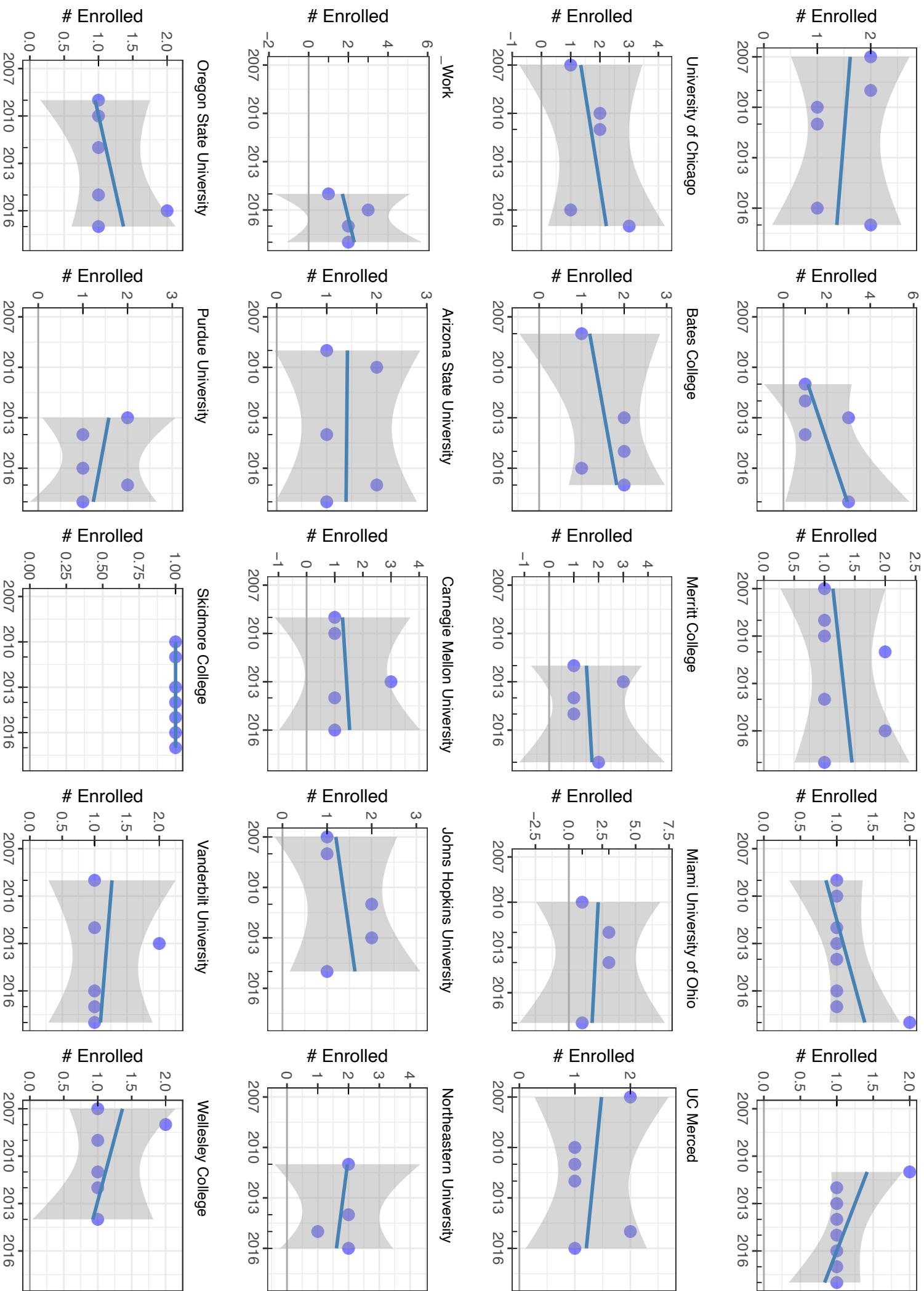
Pomona College

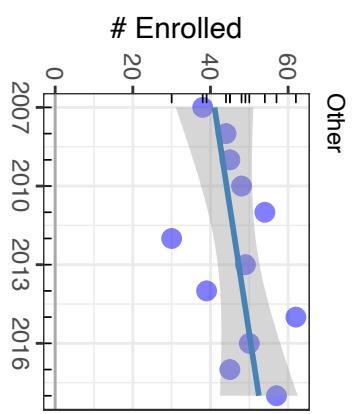
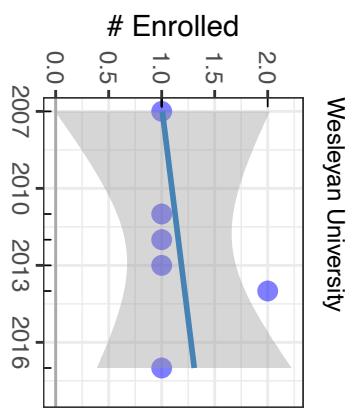
Saint Marys College

Scripps College

Tufts University

University of British Columbia





Notes

Ivy League = Brown, Cornell, Columbia, Dartmouth, Harvard, Princeton, U Penn and Yale.

Other = Approx 245 colleges that enrolled ≤ 6 PUSD graduates from 2007–18.

Foreign Study includes Europe, the Middle East and Asia but excludes Canada.

Universities listed in order of total number of PUSD students having attended there.

Wider variation bands around trend lines indicates lower confidence in the accuracy of the trend line.

Assumptions / Findings

- Reduced overall admission rates in part due to higher Decline to State and Gap Year students.
- Enrollment trends are not very scientific since policy changes at each university could cause trend reversals.

Despite these shortcomings, visually accounting for outliers and trend line variation bands:

- UC Berkeley, UC Davis, Ivy League, UCLA, UC San Diego, USF & Stanford appear declining.
- Cal Poly (SLO), SD State, NYU, Tulane, Loyola, U Wisconsin, U Denver and 'Other' appear rising.
- Zero going to UC Berkeley in 2018 confirmed: <http://www.piedmont.k12.ca.us/phs/pdf/about-phs/profile.pdf>

Possible Explanations (after speaking with the District)

Some educated guesses attempting to explain declining enrollment trends:

1. The number of applications have skyrocketed making those colleges much more competitive.
2. Universities accepting more out-of-state and foreign undergrad students paying much higher tuition.
3. Colleges significantly increased the number of students per class making them less attractive.
4. Rising tuition might have shifted focus on colleges offering scholarships.

Some educated guesses attempting to explain increasing enrollment trends:

1. Some colleges have very specialized programs that lead to jobs in certain industries.
2. Liberal arts colleges nationwide are attractive for students not interested in specialization.
3. Community Colleges have lower tuition and allow transfers to universities at a later stage.

Piedmont Graduate ACT Scores stable... no Flynn Effect:

Average ACT Score	2011	2012	2013	2014	2015	2016	2017	2018
	28.7	28	27.8	28.1	27.9	29	28.9	29.4

Additional Questions

- Is there a trend for more private colleges and more out-of-state colleges?
- Is there a trend toward more expensive colleges? A decrease in urban public colleges?
- For colleges with declining enrollment, are there fewer applications from PUSD grads or have acceptance rates changed?
- Has changing college acceptance rates become a reason for higher gap year and decline to state students?
- The high school Wellness Center has approx 2000 complaints per year, the majority about academic performance.
- Has changing enrollment / acceptance patterns increased college applicant stress over the years 2007–18?

College-Year Level Summaries

college	city	state	class_07	class_08	class_09	class_10	class_11	class_12	class_13	class_14	class_15	class_16	class_17	class_18	total
UC Berkeley	Berkeley	CA	21	11	10	13	4	7	8	5	4	10	5	0	98
UC Davis	Davis	CA	15	14	12	6	7	10	8	4	3	2	1	8	90
University of Oregon	Eugene	OR	7	22	8	6	9	1	1	2	5	4	11	7	83
UC Santa Cruz	Santa Cruz	CA	19	5	6	9	5	3	8	4	4	6	6	6	81
Ivy League	East Coast	9	11	1	8	8	8	3	5	0	9	5	3	70	
UCLA	Los Angeles	CA	15	9	4	6	7	6	4	2	4	1	4	4	66
Cal Poly(San Luis Obispo)	San Luis Obispo	CA	2	2	5	7	4	4	7	7	4	3	7	7	59
UC Santa Barbara	Santa Barbara	CA	5	6	4	4	5	8	7	5	3	5	3	4	59
_Gap Year	NA	NA	0	0	3	3	5	6	5	1	6	9	14	5	57
Diablo Valley College	Pleasant Hill	CA	7	4	7	3	6	6	2	2	4	5	1	1	48
University of Colorado	Boulder	CO	3	5	2	6	6	3	3	1	6	2	4	4	45
UC San Diego	La Jolla	CA	4	7	4	7	1	1	2	6	2	5	2	1	42
Cal State, Chico	Chico	CA	7	2	5	1	6	8	2	2	4	1	3	0	41
Berkeley City College	Berkeley	CA	0	1	0	9	4	1	6	4	5	5	4	1	40
Cal State, San Francisco	San Francisco	CA	3	4	1	6	2	6	4	2	2	2	2	3	37
University of Washington	Seattle	WA	4	1	0	4	0	6	4	5	8	0	3	1	36
University of Puget Sound	Tacoma	WA	1	3	4	2	3	5	3	1	5	1	3	3	34
University of Southern Cal	Los Angeles	CA	9	3	1	2	2	3	0	5	1	3	3	2	34
University of Arizona	Tucson	AZ	2	4	4	3	5	0	1	1	6	1	4	2	33
_Declined to State	NA	NA	0	0	0	0	0	0	1	3	0	8	13	8	33
Cal State, Sonoma	Rohnert Park	CA	6	1	1	1	7	0	1	3	5	1	1	2	29
Foreign Study	Offshore	EU	0	1	4	0	3	4	1	5	2	4	2	3	29
_Undecided	NA	NA	0	3	4	0	5	0	0	0	0	7	5	28	
Santa Barbara City College	Santa Barbara	CA	0	2	1	3	1	1	0	7	7	1	1	1	25
Stanford University	Palo Alto	CA	3	3	4	1	0	4	2	0	3	2	1	2	25
University of Michigan	Ann Arbor	MI	2	1	1	2	4	4	1	3	2	1	2	1	24
New York University	New York City	NY	2	2	1	2	0	1	4	0	0	5	2	2	21
UC Riverside	Riverside	CA	5	0	1	3	1	1	4	1	0	2	0	3	21
Cal State, San Diego	San Diego	CA	1	1	2	1	1	2	4	2	0	1	0	4	19
Macalester College	St. Paul	MN	0	2	1	2	2	0	2	0	5	1	1	2	18

college	city	state	class_07	class_08	class_09	class_10	class_11	class_12	class_13	class_14	class_15	class_16	class_17	class_18	total
Northwestern University	Evanston	IL	0	0	2	2	0	2	4	3	1	2	2	18	
Tulane University	New Orleans	LA	2	1	0	1	0	0	3	1	2	3	3	2	18
Washington University	St. Louis	MO	1	1	1	0	5	1	2	2	0	1	3	1	18
Chapman University	Orange	CA	0	1	2	3	3	0	0	0	0	0	5	2	16
Boston University	Boston	MA	1	1	1	0	4	1	0	1	3	1	2	0	15
Santa Clara University	Santa Clara	CA	1	2	0	2	1	1	3	1	0	1	1	2	15
Loyola Marymount University	Los Angeles	CA	1	1	1	2	0	0	1	1	0	3	2	2	14
Occidental College	Los Angeles	CA	4	1	0	0	2	1	2	0	0	2	2	0	14
University of Wisconsin	Madison	WI	0	1	1	2	1	0	0	0	2	1	2	4	14
_Military	NA	NA	0	1	1	3	2	0	0	3	3	0	0	0	14
University of San Francisco	San Francisco	CA	0	1	4	3	1	0	1	2	0	0	0	1	13
Cal Poly (Pomona)	Pomona	CA	3	0	1	0	1	1	0	1	1	2	2	0	12
Cal State, Humboldt	Arcata	CA	0	0	2	2	0	1	1	1	1	0	2	12	
Lewis & Clark College	Portland	OR	2	0	2	3	1	0	0	2	1	0	1	0	12
Massachusetts Institute of Technology	Cambridge	MA	1	0	1	1	2	3	0	1	1	0	1	1	12
Seattle University	Seattle	WA	0	0	0	2	2	0	0	0	2	0	2	4	12
Whitman College	Walla Walla	WA	0	0	1	0	0	3	0	1	4	2	1	0	12
Laney College	Oakland	CA	1	1	0	4	0	0	4	0	0	0	1	0	11
Montana State University	Bozeman	MT	1	0	0	0	0	2	0	2	1	0	5	0	11
University of the Pacific	Stockton	CA	0	2	0	3	0	0	1	1	2	2	0	0	11
Bucknell University	Lewisburg	PA	3	2	0	1	0	0	0	0	3	0	1	0	10
Colgate University	Hamilton	NY	1	0	0	1	1	0	2	2	1	2	0	0	10
Denison University	Granville	OH	0	0	0	2	0	0	0	2	1	2	1	2	10
George Washington University	Washington	DC	1	2	2	1	0	0	2	1	1	0	0	0	10
Pitzer College	Claremont	CA	0	0	0	2	1	1	0	0	2	2	1	1	10
University of Denver	Denver	CO	0	0	1	2	0	0	0	0	2	0	2	3	10
Willamette University	Salem	OR	1	0	1	0	1	4	0	2	1	0	0	0	10
Cal State, San Jose	San Jose	CA	0	3	1	0	0	0	1	1	2	0	1	0	9
College of Alameda	Alameda	CA	0	1	3	0	0	0	1	1	2	1	0	0	9
Oberlin College	Oberlin	OH	1	1	2	0	0	0	1	1	1	0	0	2	9

college	city	state	class_07	class_08	class_09	class_10	class_11	class_12	class_13	class_14	class_15	class_16	class_17	class_18	total
Pomona College	Claremont	CA	2	0	2	1	1	0	0	0	0	1	2	0	9
Saint Marys College	Moraga	CA	0	0	0	0	1	1	3	1	0	0	0	3	9
Scripps College	Claremont	CA	1	0	1	1	2	0	0	1	0	2	0	1	9
Tufts University	Medford	MA	0	0	1	1	0	1	1	1	0	1	1	2	9
University of British Columbia	Vancouver	Canada	0	0	0	0	2	1	1	1	1	1	1	1	9
University of Chicago	Chicago	IL	1	0	0	2	2	0	0	0	0	1	3	0	9
Bates College	Lewiston	ME	0	1	0	0	0	0	2	0	2	1	2	0	8
Merritt College	Oakland	CA	0	0	0	0	0	1	3	1	1	0	0	2	8
Miami University of Ohio	Oxford	OH	0	0	0	1	0	3	0	3	0	0	0	1	8
UC Merced	Merced	CA	2	0	0	1	1	1	0	0	2	1	0	0	8
_Work	NA	NA	0	0	0	0	0	0	0	0	1	3	2	2	8
Arizona State University	Tempe	AZ	0	0	1	2	0	0	0	1	0	0	2	1	7
Carnegie Mellon University	Pittsburgh	PA	0	0	1	1	0	0	3	1	0	1	0	0	7
Johns Hopkins University	Baltimore	MD	1	1	0	0	2	0	2	0	1	0	0	0	7
Northeastern University	Boston	MA	0	0	0	0	2	0	0	2	1	2	0	0	7
Oregon State University	Corvallis	OR	0	0	1	1	0	1	0	0	1	2	1	0	7
Purdue University	West Lafayette	IN	0	0	0	0	0	0	2	1	0	1	2	1	7
Skidmore College	Saratoga Springs	NY	0	0	0	1	1	0	1	1	1	1	0	0	7
Vanderbilt University	Nashville	TN	0	0	1	0	0	1	2	0	0	1	1	1	7
Wellesley College	Wellesley	MA	1	2	1	0	1	1	0	1	0	0	0	0	7
Wesleyan University	Middletown	CT	1	0	0	1	1	1	2	0	0	1	0	0	7

Additional Resources

Each high school student will get a login for <https://www.naviance.com> for customized college recommendations.

<https://studentclearinghouse.org/colleges/studenttracker/> can accurately produce college admission data.

<https://www.ppic.org/publication/higher-education-funding-in-california/>

<https://www.cascooldashboard.org/reports/01612750000000/2018>

<http://assist.org>

<https://collegescorecard.ed.gov/>

<https://www.commonapp.org/>

<https://admissions.universityofcalifornia.edu>

<https://www.collegesimply.com/>

<https://prepscholar.com/>

Final Notes

Created and produced in fulfillment of a Hari Titan for PUSD Board 2018 campaign promise.

Thanks to the Piedmont Post for re-publishing raw data obtained from the Piedmont Highlander every year.

For questions contact: Hari Titan PhD <HSTitan@yahoo.com>

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CALIFORNIA

UC moves toward holistic review of applicants

By Larry Gordon, Los Angeles Times

Jan. 20, 2011 12 AM PT

The University of California regents on Wednesday moved to expand the use of an undergraduate admissions practice in which applicants' grades and test scores are considered in the context of their educational opportunities and life experiences.

UCLA and UC Berkeley already use the admissions process, known as holistic review, in which an applicant's entire file, including essays, are read and scored as a whole, rather than in pieces. At least two other UC campuses, San Diego and Irvine, are adopting the method this year, officials said.

As the university's governing board met at UC San Diego, a regents' committee approved the resolution that urges, but does not require, all nine undergraduate UC campuses to use holistic review in admissions decisions. Adoption by the full board is expected Thursday. No date has been set for its implementation.

Some regents said they feared broader use of holistic review might introduce too much subjectivity to the process of choosing students and could be seen as an attempt to get around the state's ban on affirmative action. But admissions officials said the method, in use at UC Berkeley since 2001 and UCLA since 2007, is the best and fairest way to pick a freshman class from a competitive applicant pool.

Under holistic review, admissions readers come up with a single score for an applicant's file, including information about high school courses, SAT or ACT exams, extracurricular activities, special talents and any difficulties the student overcame.

Parents for Educational Excellence in Piedmont



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PEEP Board Meeting

April 2, 2024

Hari Titan, President of PEEP

In the hopes of increasing PUSD enrollment that would otherwise go to private schools or even home-schooling, Dr. Hawn is investigating the possibility of adding 2 different independent study programs, one of which was suggested by PEEP.



Jennifer Hawn
to me ▾

Mar 12, 2024, 8:48AM ⭐ ☺ ↵ ::

Thanks, Hari. I always appreciate your thinking about innovation in education. I had not thought about independent study for GATE students, and so I will advise Ariel to explore this option. Ruth is the keeper of the financial and enrollment information, and so I will get together with her for this information. Currently, we are exploring independent study for high school students, basing our model on other districts where I have worked (i.e., Beverly Hills USD) where robust hybrid independent study programs are offered and in very high demand. My hope is that we can fill a gap in our program and that we can increase our enrollment, starting with high school and possibly other grades in the future.

More to come, and thank you for your ideas.

Gratefully,

Jen



Jennifer Hawn, Ed.D.
Superintendent
Piedmont Unified School District
(510) 594-2614 - Office

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	2023-24	2024-25	2025-26
Beginning Balance	\$3,549,277	\$2,823,558	\$2,403,060
Revenues:			
LCFF	\$26,566,097	\$26,363,249	\$26,733,053
Other Fed & State	4,273,719	4,323,867	4,354,107
Parcel Taxes	14,141,136	14,370,789	14,605,035
PEF	3,332,000	3,300,000	3,300,000
Other Local	2,682,261	2,884,503	2,916,005
Total Revenues	50,995,213	51,242,408	51,908,200
Expenses:			
Certificated Salaries	21,169,407	21,146,740	21,064,826
Classified Salaries	7,643,526	7,714,961	7,787,111
Benefits	13,964,980	14,160,975	14,213,186
Non-Personnel Costs	8,254,992	7,249,018	7,437,391
Cost of 2% 2023-24, 24-25, 25-26	688,027	688,027	688,027
Cost of 4% 2024-25, 2025-26	1,403,186	1,403,186	
Cost of 3% 2025-26			1,089,972
Budget Adjustments			
Total Expenditures	51,720,932	-700,000	-1,800,000
Net Surplus (Deficit)	-725,719	-420,499	24,501
Ending Balance	\$2,823,558	\$2,403,060	\$2,427,561



SCHOOL GRADING POLICIES ARE FALLING CHILDREN

A Call to Action for Equitable Grading

JOE FELDMAN

District #1: Cohort of 24 teachers across a rural/suburban district's four high schools—over 3,700 grades assigned



In the charts above, equitable grading resulted in a reduction in the rate of Ds and Fs teachers assigned, as well as a reduction in the rate of As teachers assigned.

The charts above indicate that for both the percentage of students earning D/F and earning A grades, equitable grading practices significantly reduced the disparity between white and non-white students. For example, for non-white students, the percentage of D and F grades assigned dropped by more than one-third, from 19 to 12 percent, while there was no change for White students. Similarly, the following charts reveal the same type of improvement in closing achievement gaps in an urban district's high school and middle schools.

OPINION

Do grade distributions prove bias?

By Hari Titan, Ph.D.

By California Education Code, teachers can individually use any course grading formula they see fit for the subject and course level they are teaching. In 2020, Piedmont Unified School District passed a Racial Equity board policy that made Assistant Superintendent of Educational Services Dr. Cheryl Wozniak responsible for its implementation. Dr. Wozniak thought the course grading formula should be standardized keeping a goal of racial equity in mind. Since roughly 2020, some PMS and PHS teachers voluntarily began experimenting with a grading system based on a book called "Grading for Equity" by Joe Feldman.

Do racial differences in grade distributions prove a biased education? As school board president, Veronica Andersen Thigpen agendized this topic for action by the board at a public meeting on March 22, 2023, but did not appear at the meeting to defend her position. Thigpen, who is a Fellow at Just Equations, a nonprofit that reconceptualizes the role of math in ensuring educational equity, ran for school board in 2020 on the premise that there should be equity in educational outcomes for all races.

At the public meeting on March 22, 2023, Wozniak led a presentation on "Equitable Grading Practices" to update the school board on her efforts with support from PMS and PHS school principals. Wozniak argued: "Teachers sincerely want their students' grades to be objective, but our grading systems historically have systematically perpetuated opportunity gaps and biases. For example: providing extra credit, penalizing for lateness, punishing cheating in the grade, evaluating student behavior (like how often a student raises their hand and participates), and including homework. These are all biased grading practices and dependent on a student's life circumstances, culture, and for all kinds of reasons."

Feldman's grading is solely based on a student's mastery of the content based on assessments, nothing behavioral. Feldman prohibits grading credit for homework completion, class participation, extra credit, or grade punishment for cheating because it disproportionately impacts low-income and minority students. Instead, he promotes giving students the option to be retested or resubmit work in subject areas the student did not master (a.k.a. Mastery-Based Grading), and instead of a failing grade below 50%, he would give students an incomplete that would

These features of "Grading for Equity" would inflate or deflate grades for different types of students relative to the teacher's prior grading formulas. The net impact of these grading changes is very important for college admission. School administrators did not present student grade distributions for the courses before and after the change to Grading for Equity. In 2018 Feldman produced a report that Grading for Equity reduced the number of Ds and Fs, along with the number of As. Slide 11 of his report showed a school district reduced the number of As by 16%, which was a 19% reduction for White students and a 3% reduction for Non-White students.

Blindly following Feldman without before and after grade distribution data is not helping Piedmont students. The student school board representative reported that delays from the new grading were stressful to students and consequential for college applications. At the time of this writing, the administration is continuing this effort. Equitable grade distributions are one of many possible racial equity goals that may be seen as unconstitutional under the Equal Protection Clause of the 14th Amendment of the US Constitution.

Watch the March 2023 School Board meeting for more arguments against Grading for Equity.



At the public meeting on March 22, 2023, Wozniak led

Required Skills

Ability to:

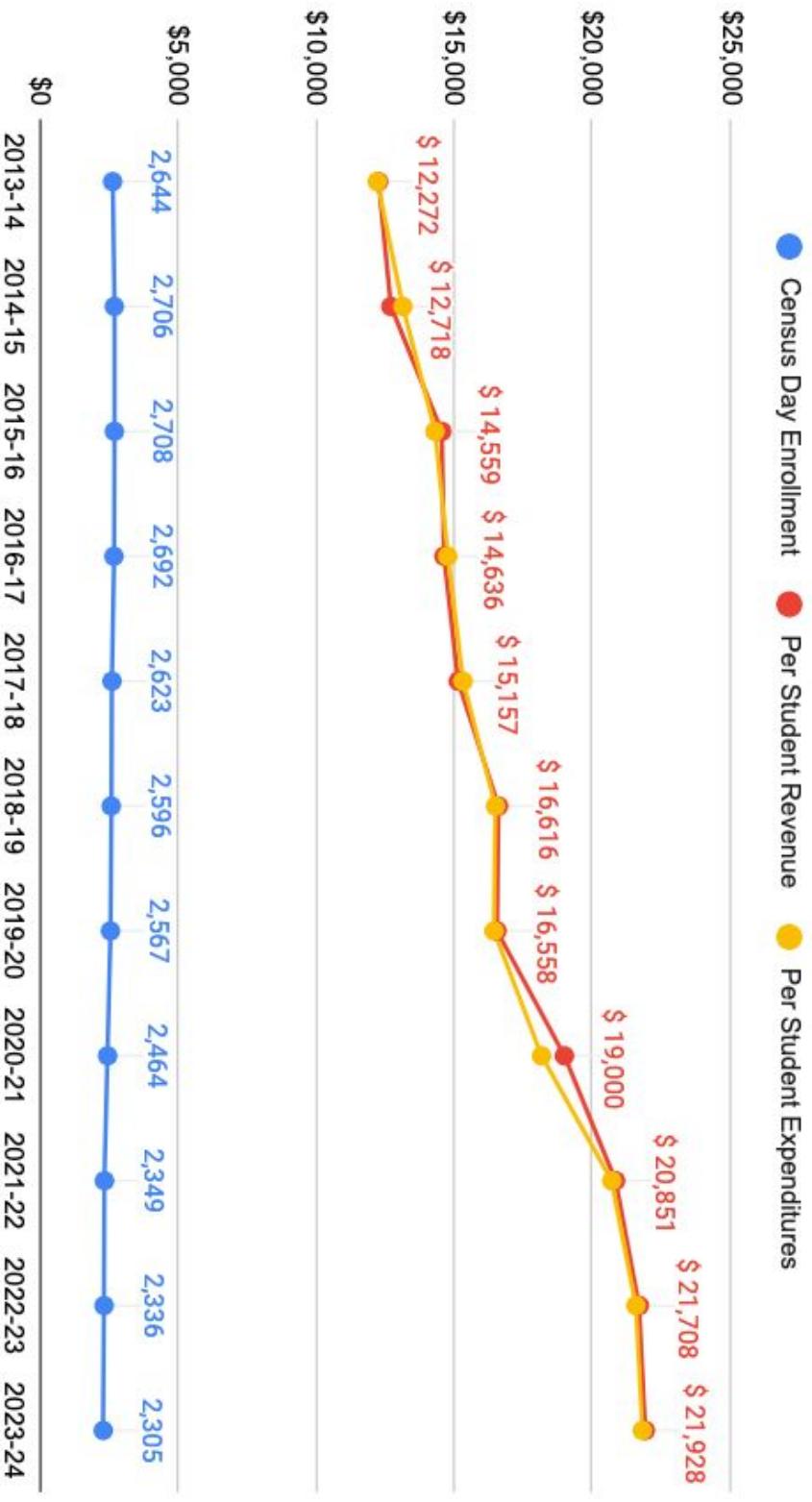
- Plan, organize, and direct the daily operations of the assigned school
- Organize, direct, train, evaluate, and supervise certificated and classified staff
- Plan and lead organizational change
- Plan and lead conversations related to racial diversity, equity, inclusion, and social justice
- Establish and maintain communication with community and parent groups
- Plan, implement, direct, and evaluate instructional and categorical programs in accordance with applicable laws
- Plan and direct the budget and business operations of the school
- Read, interpret, apply and explain rules, regulations, policies, and procedures
- Work collaboratively with others
- Communicate effectively both orally and in writing
- Prepare and deliver oral presentations

Knowledge and Implementation of:

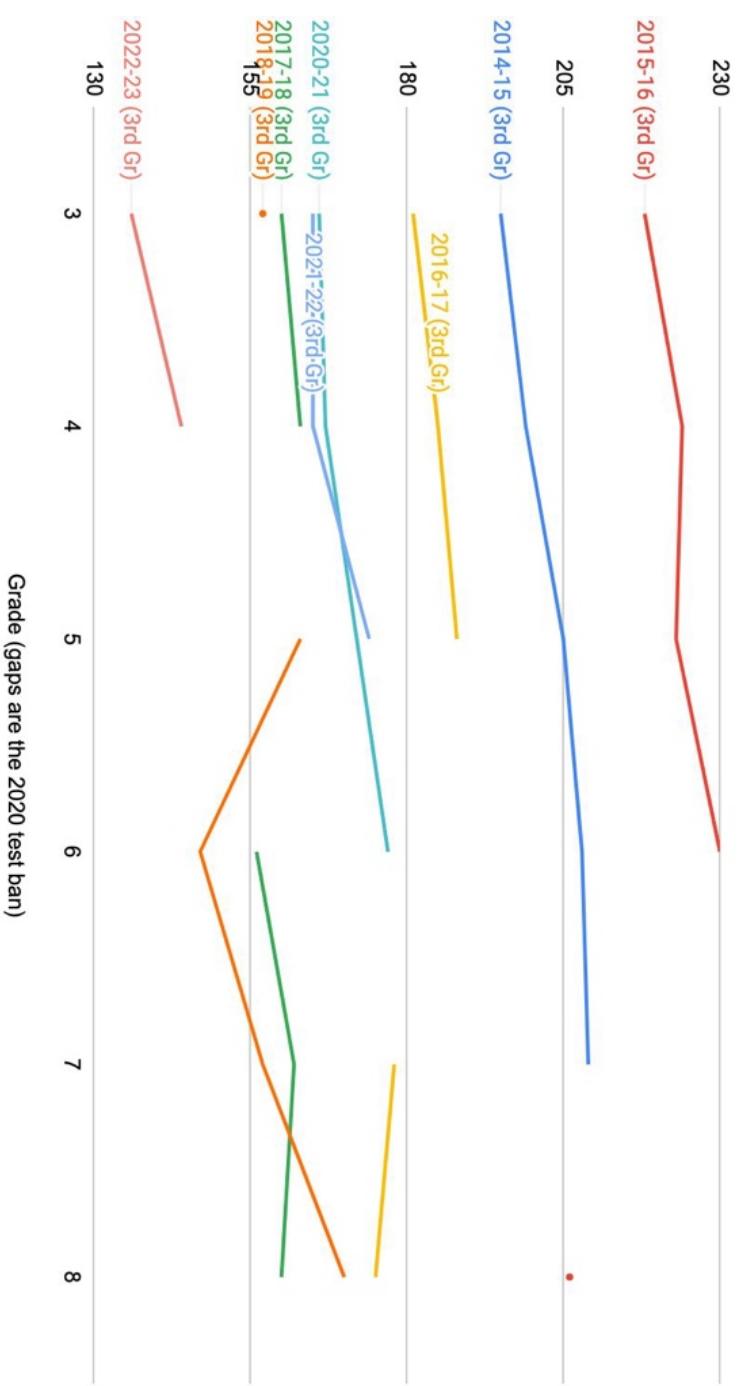
- Professional learning communities, response to intervention, multi-tiered systems of support, and equitable grading practices
- Program evaluation with measurable student outcomes
- Best practices in technology integration for students and staff
- Current state testing programs
- Budget management

bit.ly/PUSDBudget

Piedmont Unified (PEEP assembled data)

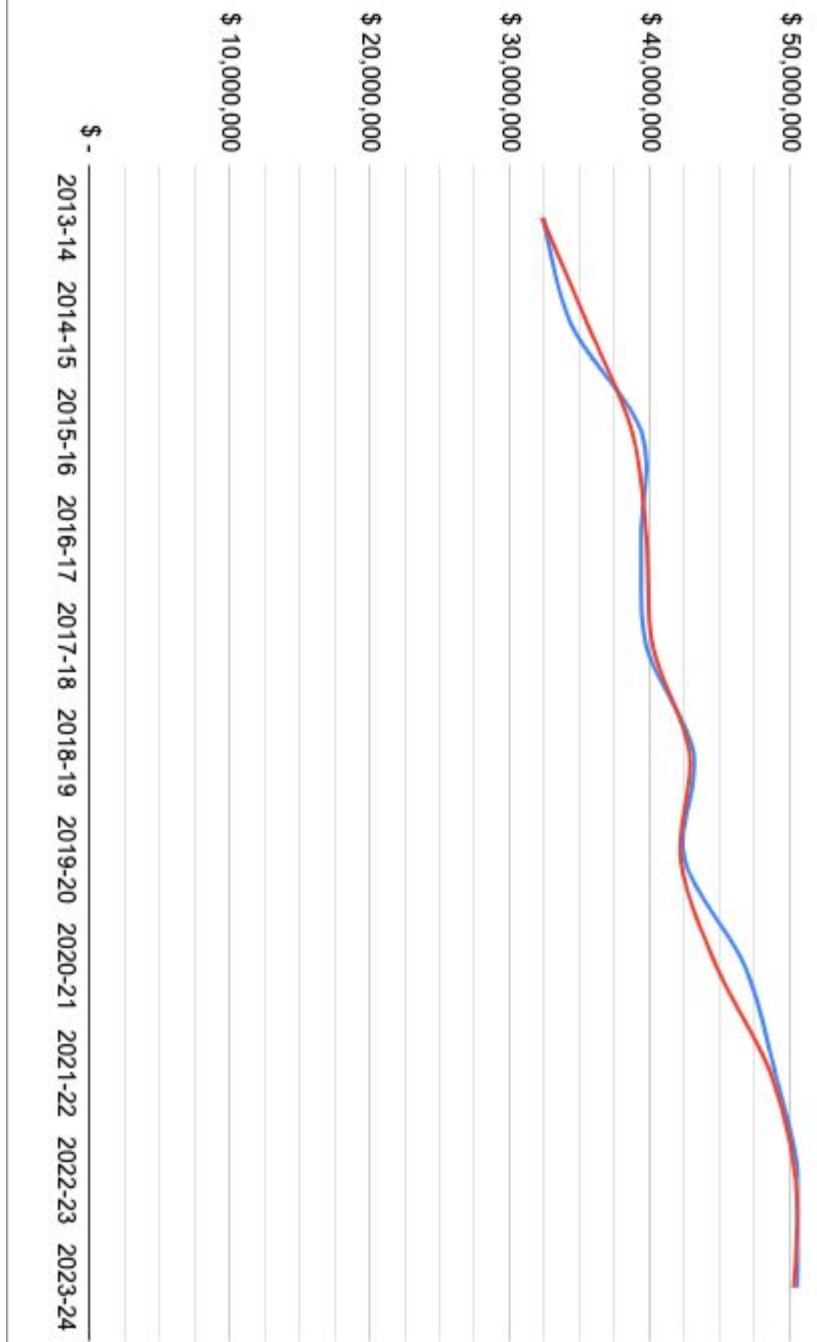


Following 3rd Grade Cohorts (# Students tested on CAASPP for ELA)



- Cohort class sizes stay within a +/- 10% band
- Class size grew in 2015-16, then declined
- 2016-19
- 2020-22 recovered a little bit above 2017-18 levels
- Decline resumed in 2022-23
- Total enrollment reflects all cohorts (and the untested grades)
- The last 6 years (2017-23) are below average
- If the next few years remain below average, total enrollment will continue declining

Total Revenue



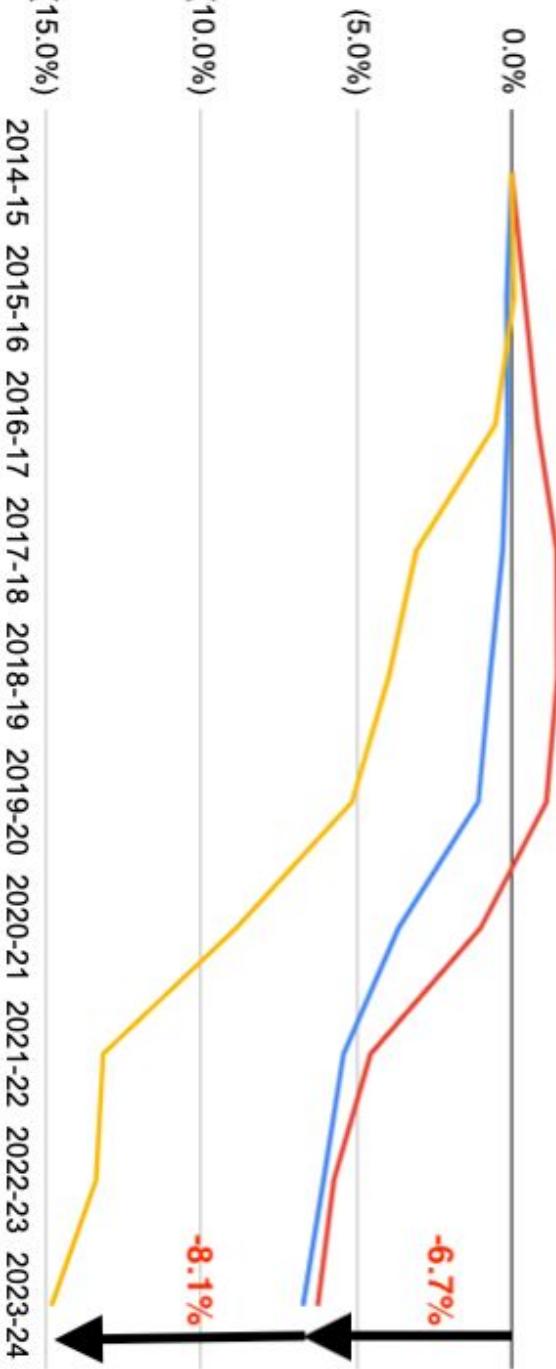
Total and per pupil revenue growth confirmed by CBO.

\approx Per Pupil Revenue * Enrollment

Is also growing but the growth is slowing to a crawl.

K12 Cumulative Change in Enrollment since 2014

— State of California — Alameda County — Piedmont Unified

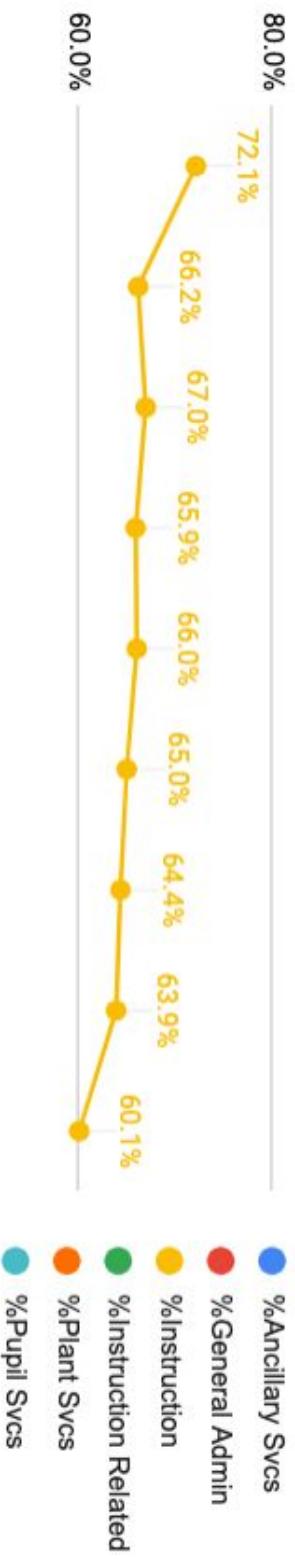


6.7% fewer
students helped
increase per
pupil state
funding.

Inflation inflates
state taxes as
well.

Where did this
money go?

% Expenditures for Instruction has declined relative to all others



PIEDMONT UNIFIED SCHOOL DISTRICT

**GENERAL FUND
REVENUE SOURCES**

2023-24 SECOND INTERIM REPORT

LCFF
51%

Parent and
Community
Support
3%

Piedmont
Education
Foundation (PEF)
7%

Measure H Parcel
Taxes
5%

Measures G
Parcel Taxes
22%

Federal
1%

Other State
Funding, incl SPED
11%

Revenues

Amount

% of Total

The share of expenditures for
teachers went down from 72%
a decade ago to 60% a couple
of years ago.

The latest district report shows
it's gone down further to 53%.

Expenditures

Amount

% of Total

Certificated (non-Admin) Salaries & Benefits
\$ 27,232,858
53%

10,532,253
20%

4,500,920
9%

Classified (non-Admin) Salaries & Benefits
\$ 10,532,253
11%

655,595
1%

1,753,891
3%

Administrator Salaries & Benefits
\$ 4,500,920
63%

1,520,758
22%

7,216,078
14%

Books & Supplies
\$ 356,183
5%

2,658,496
37%

356,183
1%

Services & Other Operating Costs
\$ 120,681
0%

11,520,758
22%

120,681
0%

Capital Outlay (Over \$5000)
\$ 51,716,864
100.00%

3,332,000
6%

51,716,864
100.00%

Transfers Among Funds
\$ 1,674,129
3%

3,332,000
6%

1,674,129
37%

Total Expenditures
\$ 51,716,864
100.00%

52,186,093
100%

52,186,093
100%

Total Revenues
\$ 52,186,093
100%

Compounded Annual Growth Rates (CAGR)

Ancillary Services	9.0%
General Administration	9.0%
Instruction	2.9%
Instruction Related Services	10.8%
Plant Services	8.2%
Pupil Services	13.3%
TOTAL Expenditures	5.2%

Annualizing the growth using the CAGR formula helps put the spending increases in context of annual inflation numbers.

In the absence of growing staff, CAGR is the maximum COLA possible, every year!

WHAT DOES \$1.4M LOOK LIKE?

Another way to consider the district budget is by program. The following list is for purposes of providing examples of programs and is not a recommendation for cuts.

Program / Expense	Unrestricted (includes Parcel Taxes & PEF Grant)	Parent Contributions	Restricted Grant	Total
Athletics	\$418,933	\$278,594	\$73,598	\$771,125
Wellness Center	161,326	63,089	60,149	284,564
Libraries	773,918	24,602	0	798,520
Arts Program	1,439,403	88,990	0	1,528,393
Counseling (K-12)	979,465	86,026	0	1,065,491
DEIB	182,702	0	196,158	378,860
Professional Development	158,567	5,354	6,665	170,586
IT Hardware - Chromebooks	145,700	19,970	0	165,670
IT Software	352,572	0	5,853	358,425
TOTAL	\$4,612,586	\$566,625	\$342,423	\$5,521,634



Hari Titan

The word "budget" in budget cuts is a bit misleading. The actual school budget has grown each year for the past decade despite declining enrollment (confirmed by the district CBO).

Declining student enrollment reduced the growth in budget to a near crawl, making it all but impossible to offer a cost-of-living-adjustment (COLA).

The union could have chosen no COLA and kept ALL the teachers, including the ones you love the most.

The union ignored that option and claimed the district was negotiating in bad faith, calling in a state mediator to independently look at the district finances. The union had previously made a case to the public that other school districts managed to give COLAs to their teachers but did not look at the district finances themselves to see where all the money from years of budget growth went.

For a deeper understanding see [bit.ly/USDDBudget](http://ly/USDDBudget)



2d Like Reply

John Savage

Hari Titan Hi Hari- the budget has grown every year as funding has increased every year per student from the state. Also, as a percentage of the total budget, the amount allocated towards teacher salaries has decreased. Any insight as to why that is?

As you talk about not increasing COLA, and keeping all teachers decreased. Any insight as to why that is?

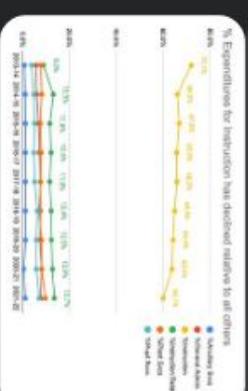
As you talk about not increasing COLA, and keeping all teachers, understand that a) we are already understaffed (I have 190+ students in 6 classes and we had to hire a long term sub for the science dept) and b) our insurance costs are about to double or more. c) teachers are already struggling to make ends meet, and d) I can go make an extra \$10-30k a year in another district nearby.

2d Like Reply



Hari Titan

John Savage I presented all my charts in [bit.ly/USDDBudget](http://ly/USDDBudget) to the district a while ago. I think I was the first one to tell the district that the amount allocated to teacher salaries has decreased from 72% of the budget a decade ago down to 60% of the budget.



2d Like Reply

Hari Titan

Administration positions have increased over the years, in large part from PEF donor requests. E.g. Director of Communications, Director of DEI, 2 Vice principals for PHS, Assistants to Assistant Superintendents etc. That's partly where the teacher COLA ended up. Utility bills have also gone up for the district, growing at 8.2% compounded annually. Pupil services like the Wellness Center and associated contract counseling staff have grown at 13.3% compounded annually.

Compounded Annual Growth Rates (CAGR)	
Ancillary Services	9.0%
General Administration	9.0%
Instruction	2.9%
Instruction Related Services	10.8%
Plant Services	8.2%
Pupil Services	13.3%
TOTAL Expenditures	5.2%

2d Like Reply



Hari Titan
My departmental percentages add up to 100% each year. While the teacher percentage went down, other percentages went up. My CAGR table shows the new revenue (growth in revenue) was not shared equally with teachers.

Over the years new revenue was directed to increased spending on Administration positions, higher utility (HVAC) bills, and Wellness visits. Teachers got at most 2.9% annual growth in pay&benefits over those years. That could have been from step&column increases or COLA adjustments or a change in compensation seniority.

Typically teachers don't publicly complain when discretionary expenses rise in operational areas.

I think the new admin positions and wellness center expenses were being advocated for by large PEF donors (often anonymously), and rubber stamped by our school board of fundraisers, most of whom were endorsed by the teacher's union or their highest representative at PEF (Cathy Grazier, largest donor to PEF).

2d Like Reply

Linda Cuckovich
Thank you for sharing these. Seems worth having a conversation about whether the budget includes too many administrators relative to the number of teachers and kids.

Meanwhile, I wouldn't frame teacher salaries as flat absent a COLA. If nominal salar... [See more](#)

Reply to Linda Cuckovich

✉️ ☺️ ☺️ ☺️ ☺️

John Savage

Hari Titan- thank you for breaking it down. Seeing all the numbers is quite useful for all parties. What to do next is the hard part.

2d Like Reply

Linda Cuckovich
Dai Meagher

At the same time, I'm assuming at least some of that unreimbursed care applies to kids with Kaiser insurance. Kaiser won't reimburse for care provided outside the Kaiser system unless it's specifically approved in advance.

2d Like Reply

Dai Meagher
Linda Cuckovich

Linda Cuckovich in talking with other stakeholders, we concluded that going forward PUSD could insist that some or all of those working in the "wellness center" could be required to be "approved" providers by Kaiser, etc.

1d Like Reply

Linda Cuckovich
Seems well worth putting some serious time and thought into this. The kind of thing that all those extra administrators could do to add value.

1d Like Reply

Reply to Linda Cuckovich

✉️ ☺️ ☺️ ☺️ ☺️

Reply to Linda Cuckovich

Hari Titan
Dai Meagher is referring to the Wellness Center (\$285k) and I believe the Counselling services (\$1.07M).

WHAT DOES \$1.1M LOOK LIKE?

Another way to consider new money budget is through the

following table for the purposes of providing an example of programs

and is DEB's recommendation for cuts.

Category	Current	Proposed	Change
Administrative	\$1,075,000	\$737,500	-\$337,500
Instructional	\$1,075,000	\$737,500	-\$337,500
Student Support Services	\$1,075,000	\$737,500	-\$337,500
Facilities	\$1,075,000	\$737,500	-\$337,500
Transportation	\$1,075,000	\$737,500	-\$337,500
Food Services	\$1,075,000	\$737,500	-\$337,500
Other Programs	\$1,075,000	\$737,500	-\$337,500
Total	\$1,075,000	\$737,500	-\$337,500

2d Like Reply

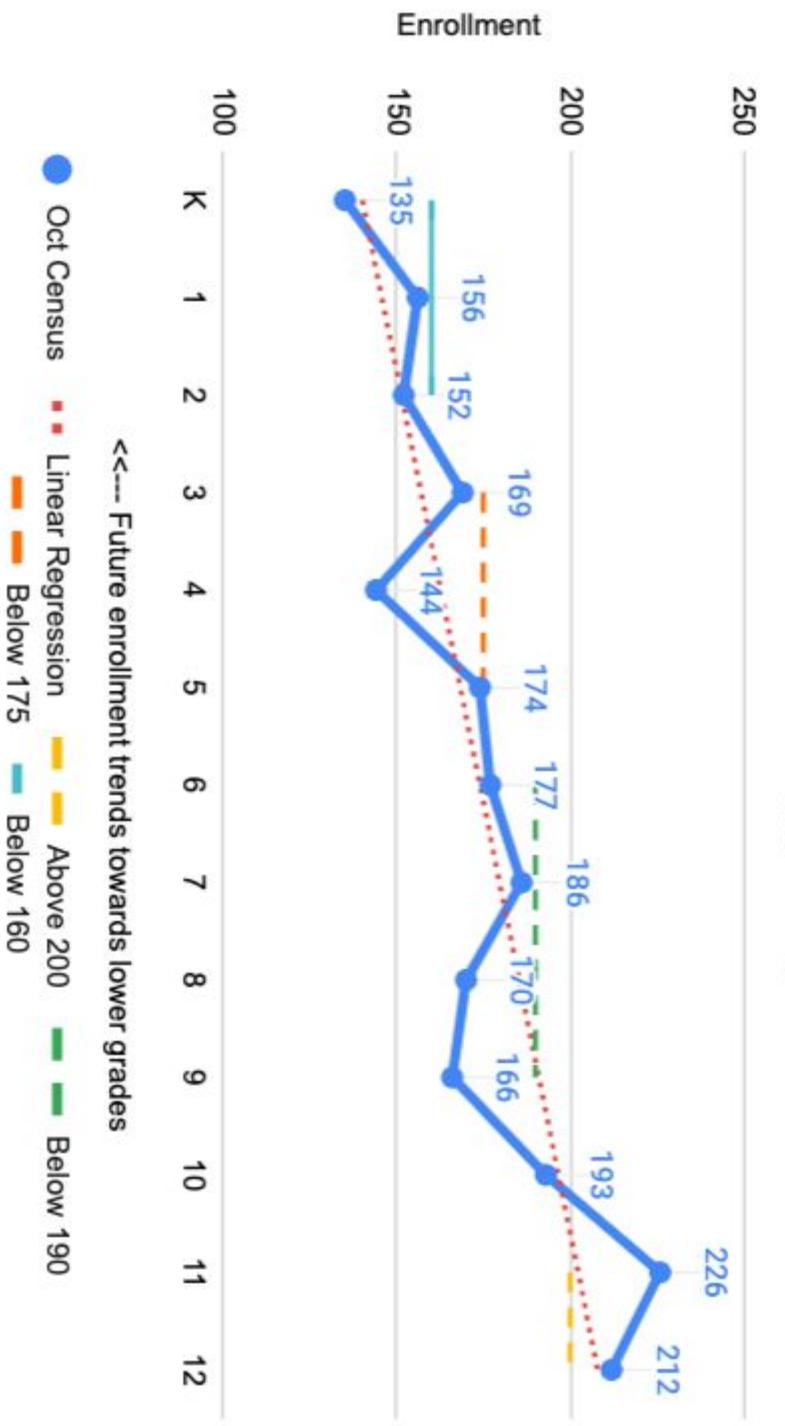
Reply to Hari Titan

Hari Titan

Dai Meagher in effect the \$379k for DEB could be considered part of "Wellness" since the DEB staff don't have authority to hire for more diversity and don't have authority to increase inter-district transfers. Those authorities rest with the school principals and superintendents of other school districts from where the students want to leave.

1d Like Reply

2023 PUSD Enrollment w/ Trend suggesting continued decline



HT: The enrollment decline is not temporary and the trend suggests it will continue

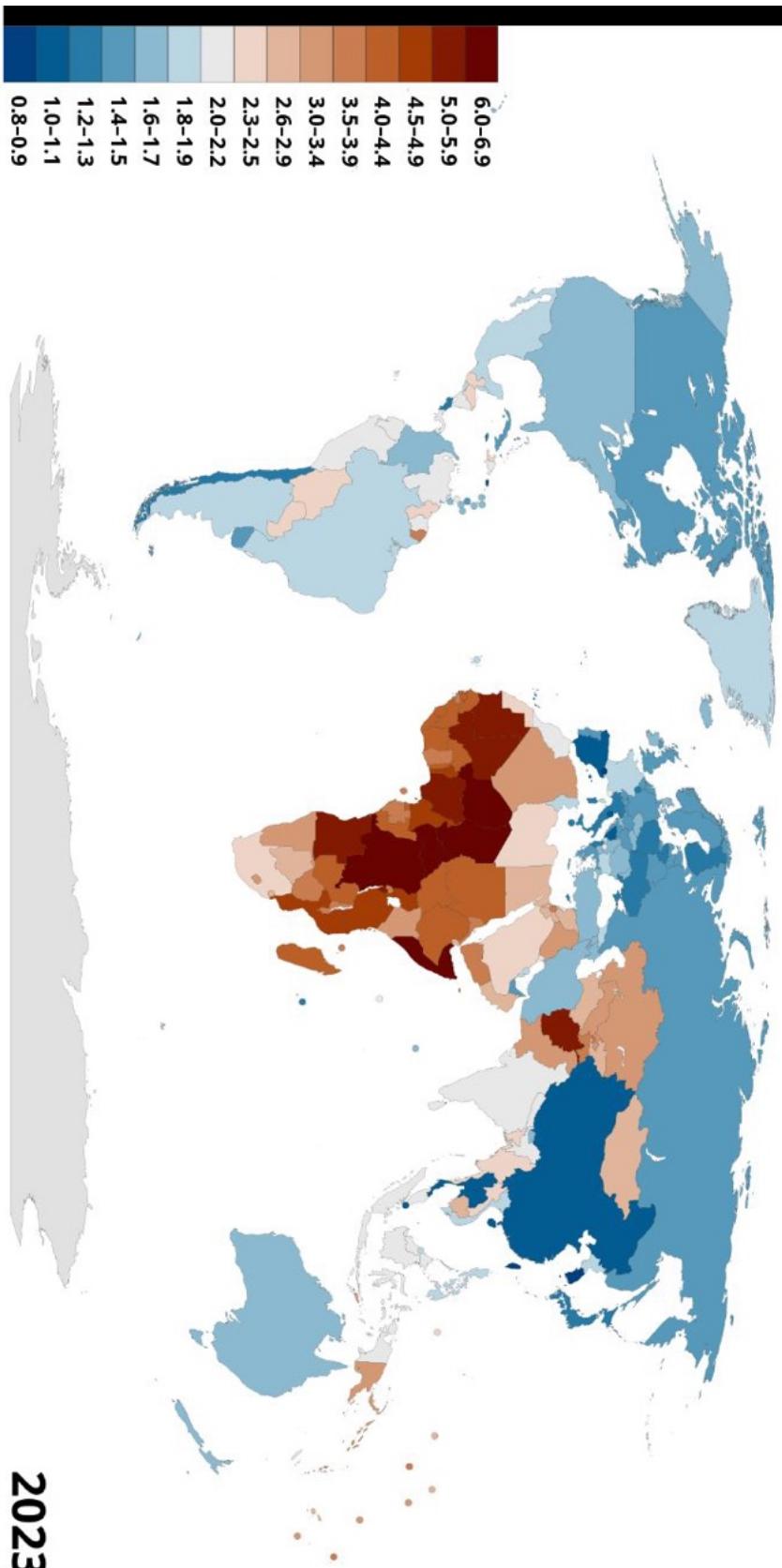
PUSD Parents & Guardians

~ 3000

PUSD Students

~ 2400

Will Piedmont parents eventually get to an average of > 2 kids
(i.e. # Parents < # Students)?

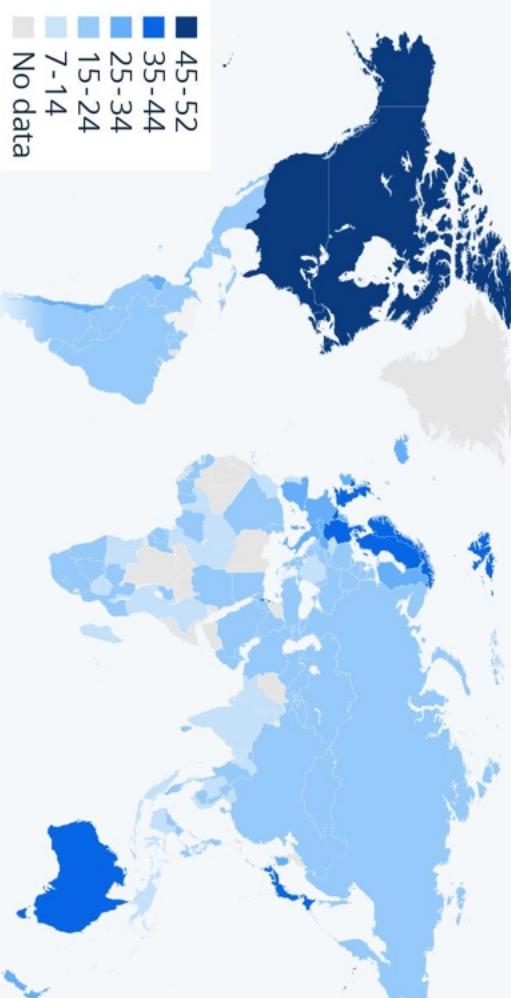


tries by fertility rate (2020), according to the Population Reference Bureau

2023

The World Map of Video Streaming

Penetration rate of video-on-demand* services around the world in 2022 (in percent)



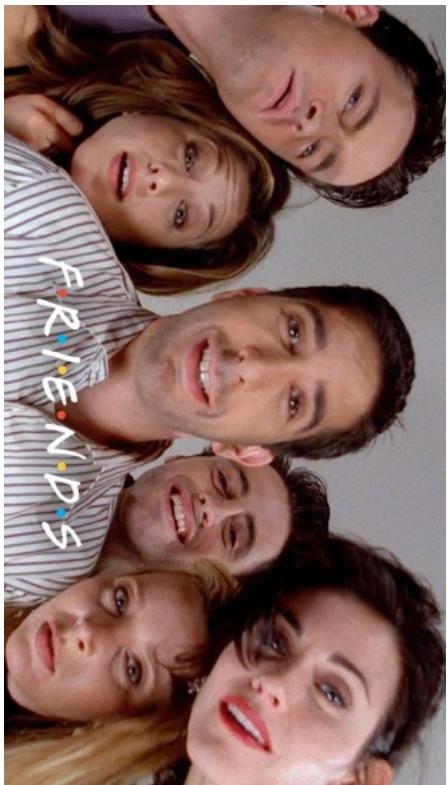
* Video-on-demand: digital subscription services, pay-per-view, downloads.

2021 data for Ukraine.

Source: Statista Digital Market Outlook



statista



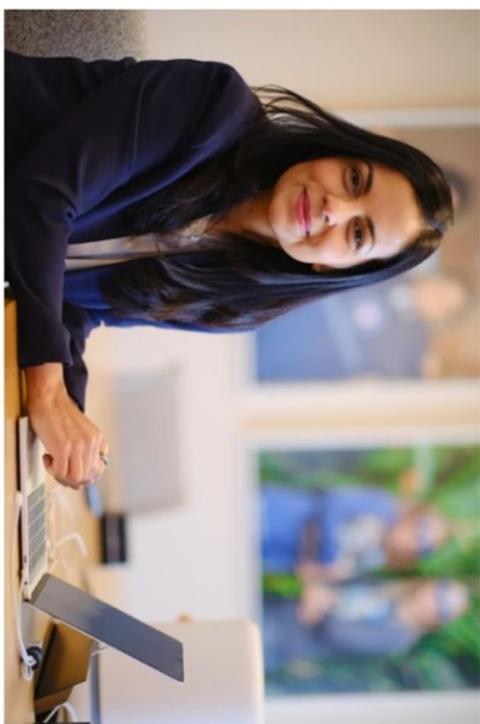
Africa has the least penetration of video streaming and from the prior slide has the highest birth rates. Other areas appear to have a similar correlation.

Video streaming services are streaming western values (e.g. female, LGBTQ liberation).

Bumble cuts ~350 employees as dating apps face a reckoning

Kyle Wiggers @kyle_l_wiggers • 4:05 PM PST • February 27, 2024

Comment



lefield

Image Credits: Salesforce

Bumble, a once-powerful force in online dating, is facing a reckoning.

The company posted weak Q4 2023 results today showing a \$32 million net loss and \$273.6 million in revenue. While up from the same period a year ago, earnings came in below Wall Street expectations and were paired with a disappointing Q1 2024 forecast — sending Bumble's stock tumbling ~10% in after-hours trading.

Match Group Stock Is Collapsing: Is There Any Hope Left for the Dating Giant?

By Brett Schaefer – Nov 7, 2023 at 10:04AM

KEY POINTS

- Match Group's revenue and profits grew in the third quarter.
- Investors sold off the stock due to Tinder's declining player count.
- Shares look cheap at these discounted levels.
- 10 stocks we like better than Match Group

nytimes.com/2024/03/12/business/dating-apps-tinder-bum...

Dating Apps Have Hit a Wall. Can They Turn Things Around?

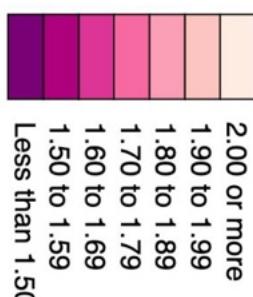
The apps have changed our love lives, but they haven't been able to convince enough young users to pay.

Bumble, a once-powerful force in online dating, is facing a reckoning. The company posted weak Q4 2023 results today showing a \$32 million net loss and \$273.6 million in revenue. While up from the same period a year ago, earnings came in below Wall Street expectations and were paired with a disappointing Q1 2024 forecast — sending Bumble's stock tumbling ~10% in after-hours trading.

California birth rate worse than US average which is below replacement

All data rounded to
the nearest hundredth

Total Fertility Rate (2021)



3,654,292 live births occurred in
the United States* in 2021.

Average: 1.66*

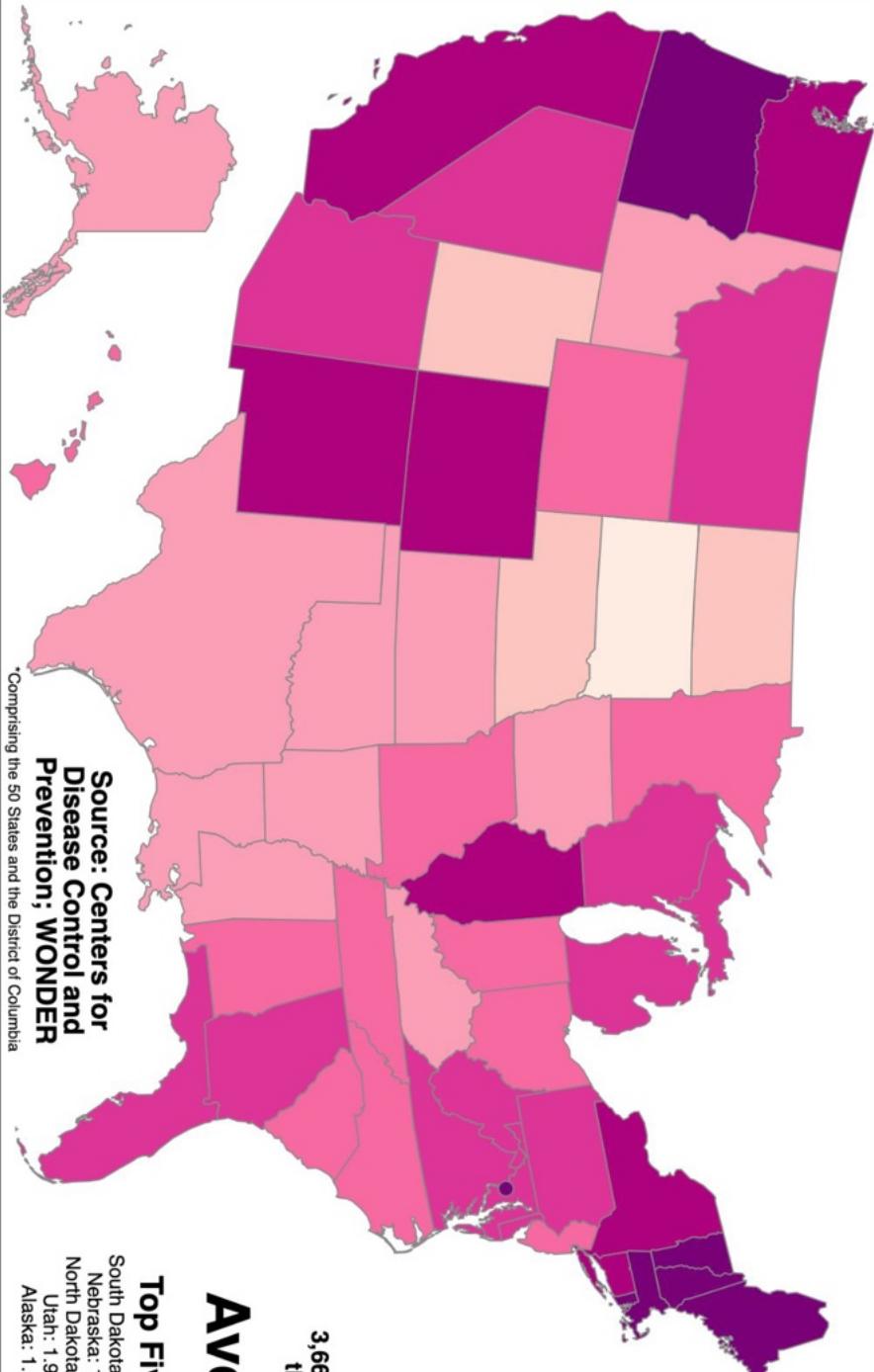
Top Five

South Dakota: 2.06
Nebraska: 1.95
North Dakota: 1.93
Utah: 1.91
Alaska: 1.88

Bottom Five

District of Columbia: 1.33
Vermont: 1.37
Rhode Island: 1.41
Oregon: 1.43
Massachusetts: 1.43

*Comprising the 50 States and the District of Columbia



(P E E P)

CAASPP

2015-24 CAASPP and CAST performance results



- CAASPP Acalanes High School District.pdf (150)
- CAASPP Alameda County.pdf (232)
- CAASPP Albany Unified School District.pdf (213)
- CAASPP Berkeley Unified School District.pdf (214)
- CAASPP Beverly Hills Unified.pdf (218)
- CAASPP Cupertino Union School District.pdf (206)
- CAASPP Dublin Unified School District.pdf (213)
- CAASPP El Segundo Unified School District.pdf (218)
- CAASPP Fremont Unified School District.pdf (216)
- CAASPP Hayward Unified School District.pdf (225)
- CAASPP Irvine Unified School District.pdf (215)
- CAASPP KIPP Navigate College Prep Charter School.pdf (132)
- CAASPP La Canada Unified School District.pdf (211)
- CAASPP Livermore Unified School District.pdf (217)
- CAASPP Los Angeles Unified School District.pdf (219)
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- CAASPP Oakland Unified School District.pdf (214)
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- CAASPP San Mateo Union High School District.pdf (148)
- CAASPP San Ramon Valley Unified School District.pdf (214)
- CAASPP Santa Clara County.pdf (233)
- CAASPP Santa Monica-Malibu Unified School District.pdf (215)
- CAASPP State of California.pdf (233)
- CAASPP Sunol Glen Unified School District.pdf (198)

© 2024 Parents for Educational Excellence in Piedmont (Est. 2020, FEIN: 85-3820446), Piedmont, California, 94611

2015–24 CAASPP Trends for the Piedmont Unified School District

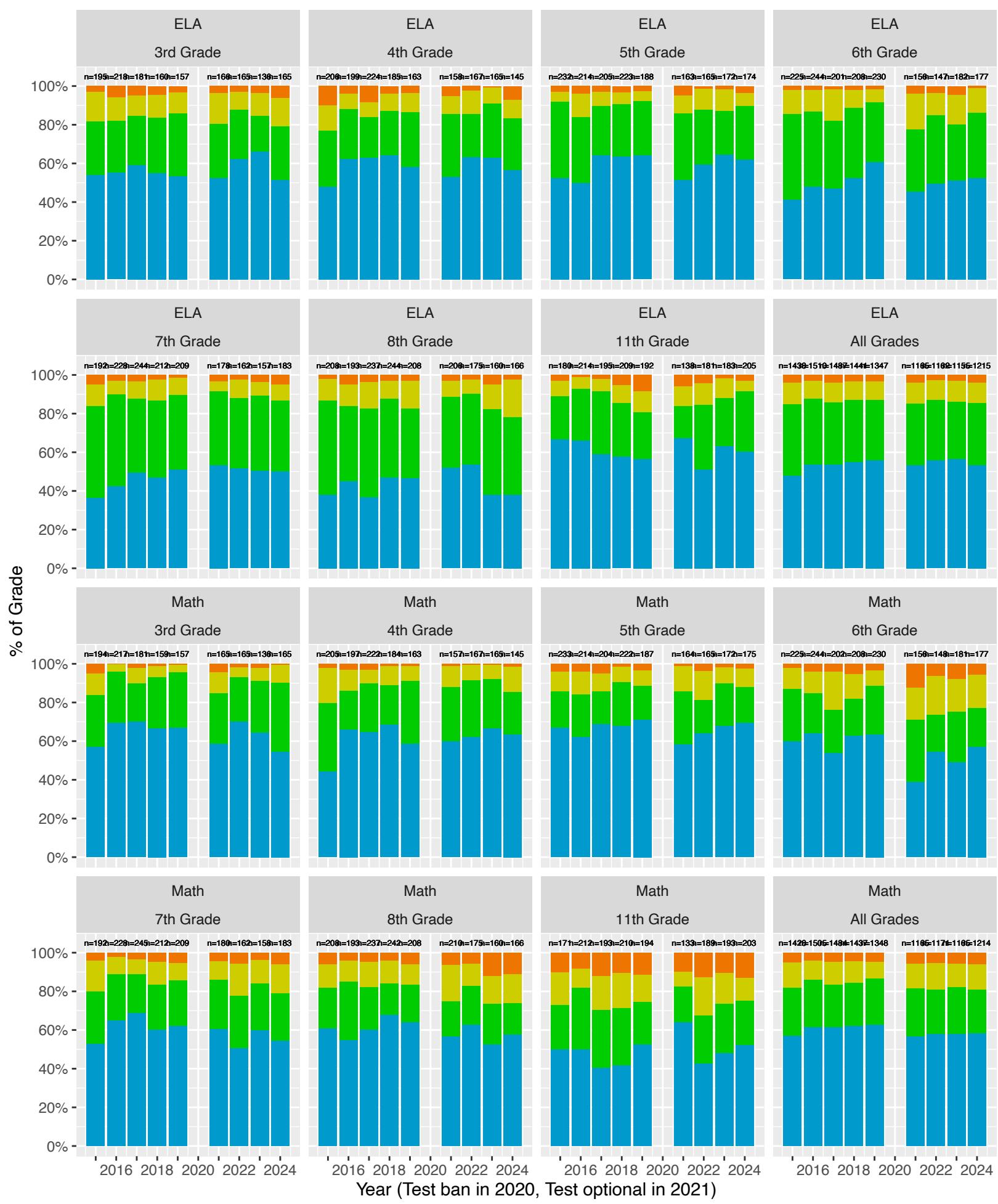
November 2024
Piedmont, California

Parents for
Educational
Excellence in
Piedmont

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CAST Physical Science by (Non–)White, Parent Education.....	p 19–20

CAASPP Test Performance: Piedmont Unified School District

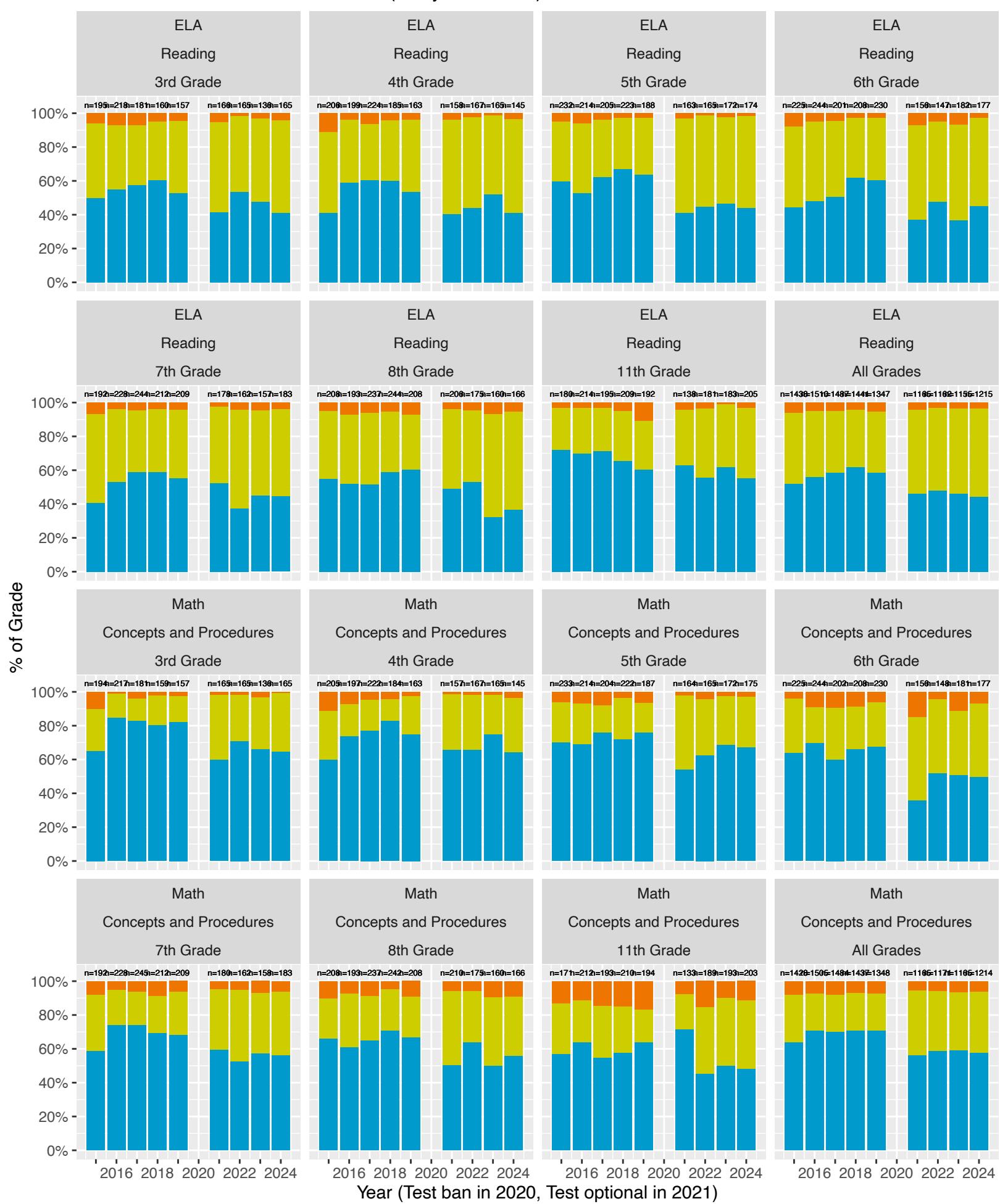


Key: Standard Exceeded (Blue) Standard Met (Green) Standard Nearly Met (Yellow) Standard Not Met (Orange)

Grades stacked (trends, variance, outliers)



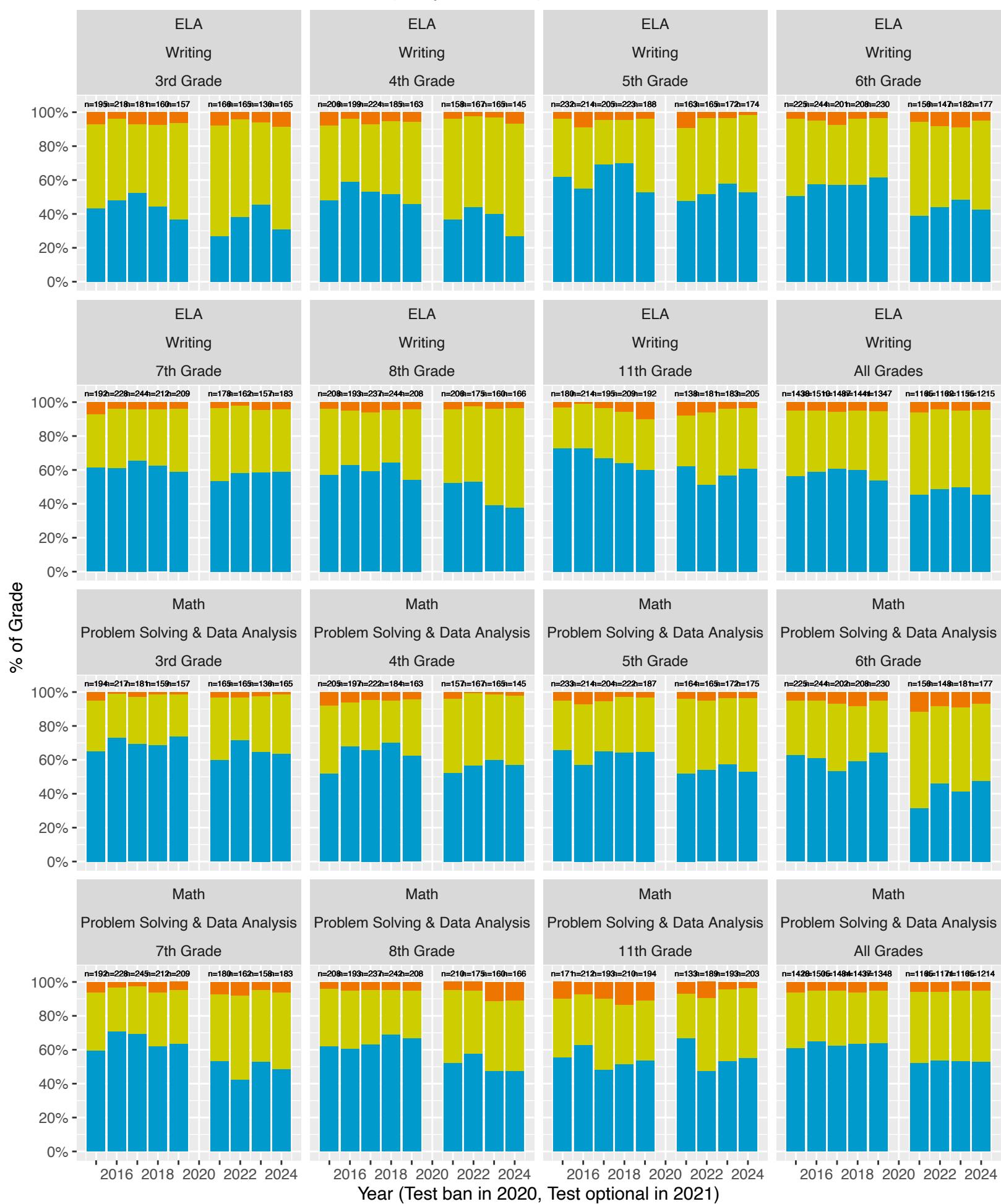
Piedmont Unified School District (Subject Area 1)



Key: Above Standard Near Standard Below Standard

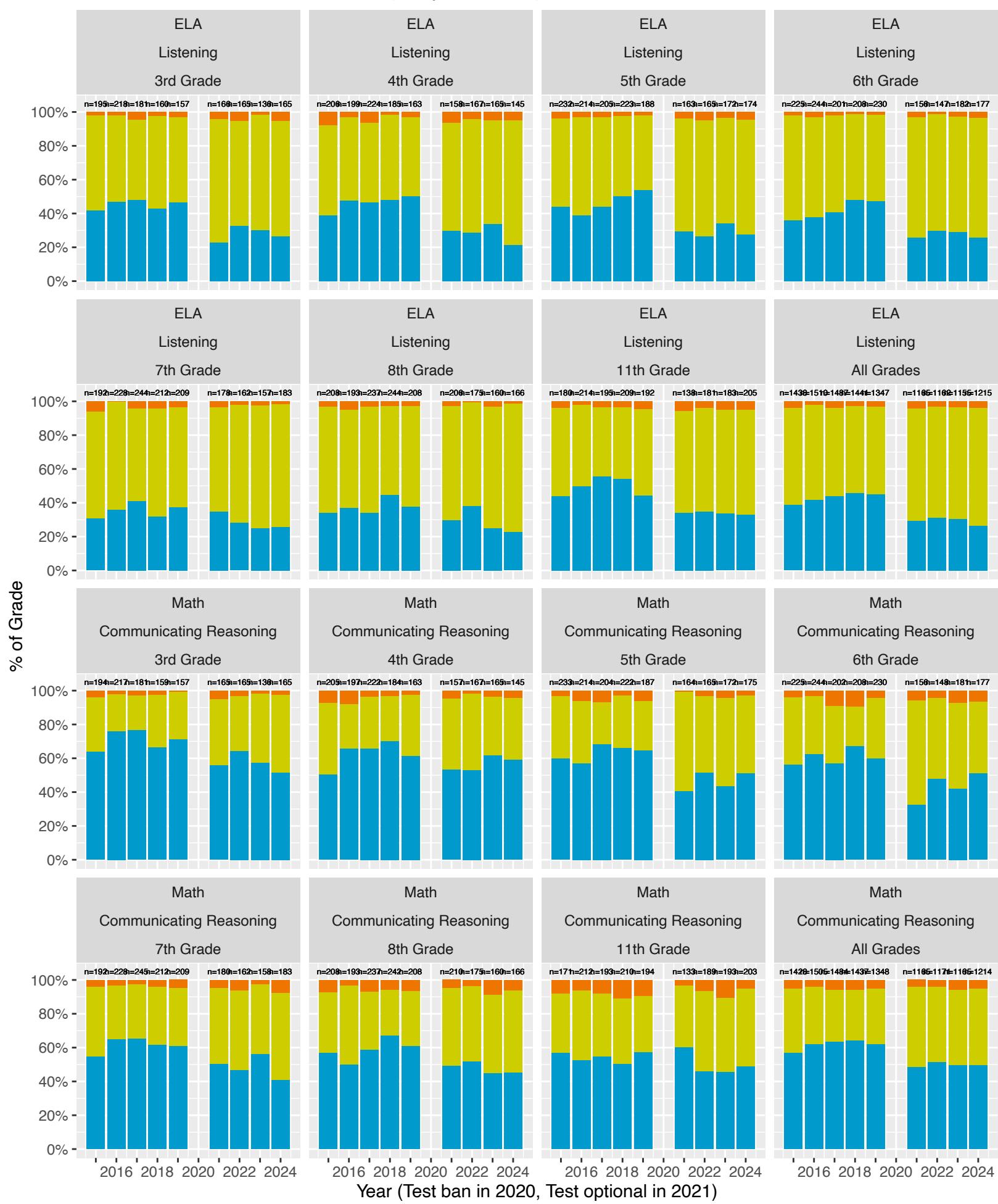
Year (Test ban in 2020, Test optional in 2021)

Piedmont Unified School District (Subject Area 2)



Key: Above Standard Near Standard Below Standard

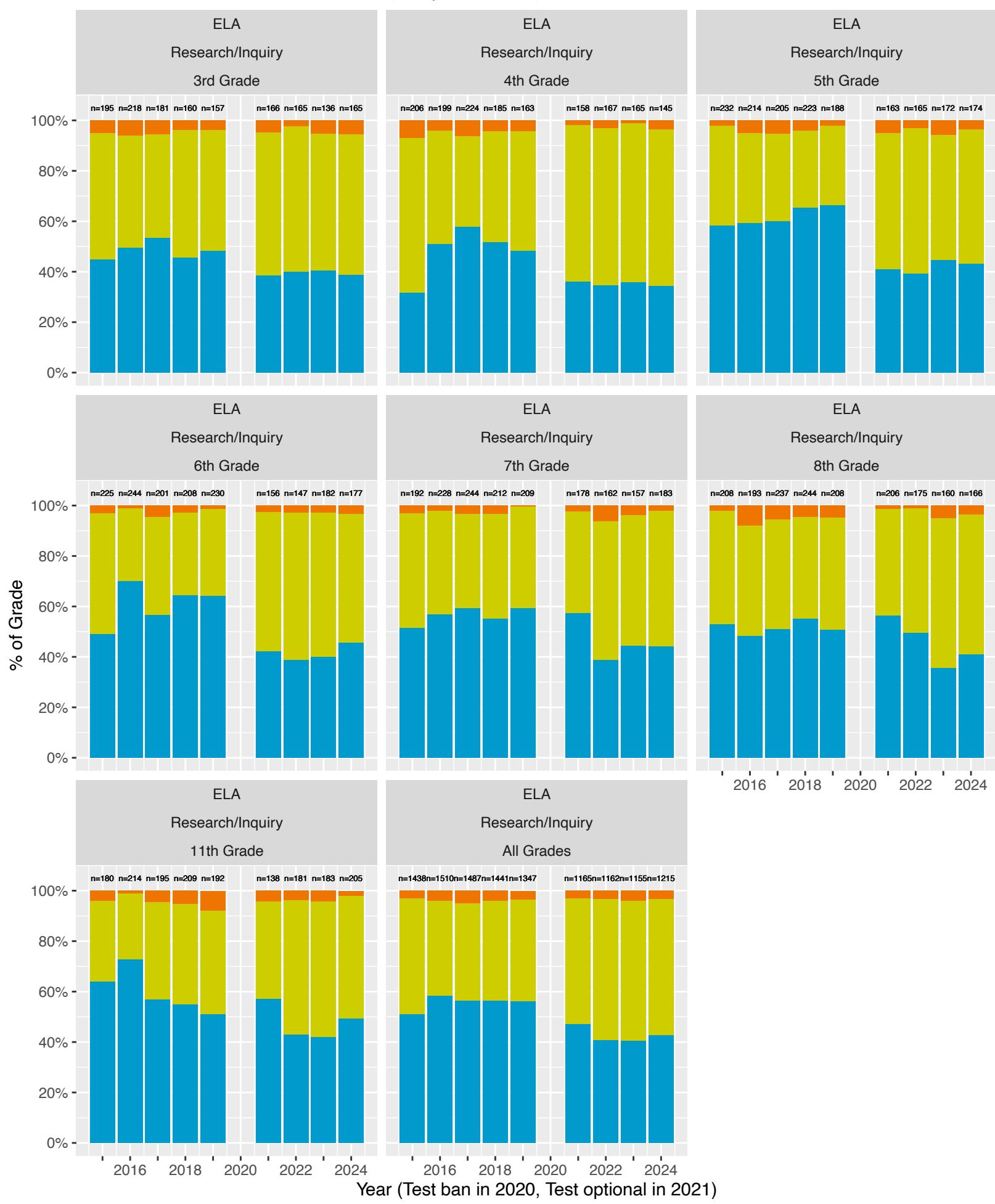
Piedmont Unified School District (Subject Area 3)



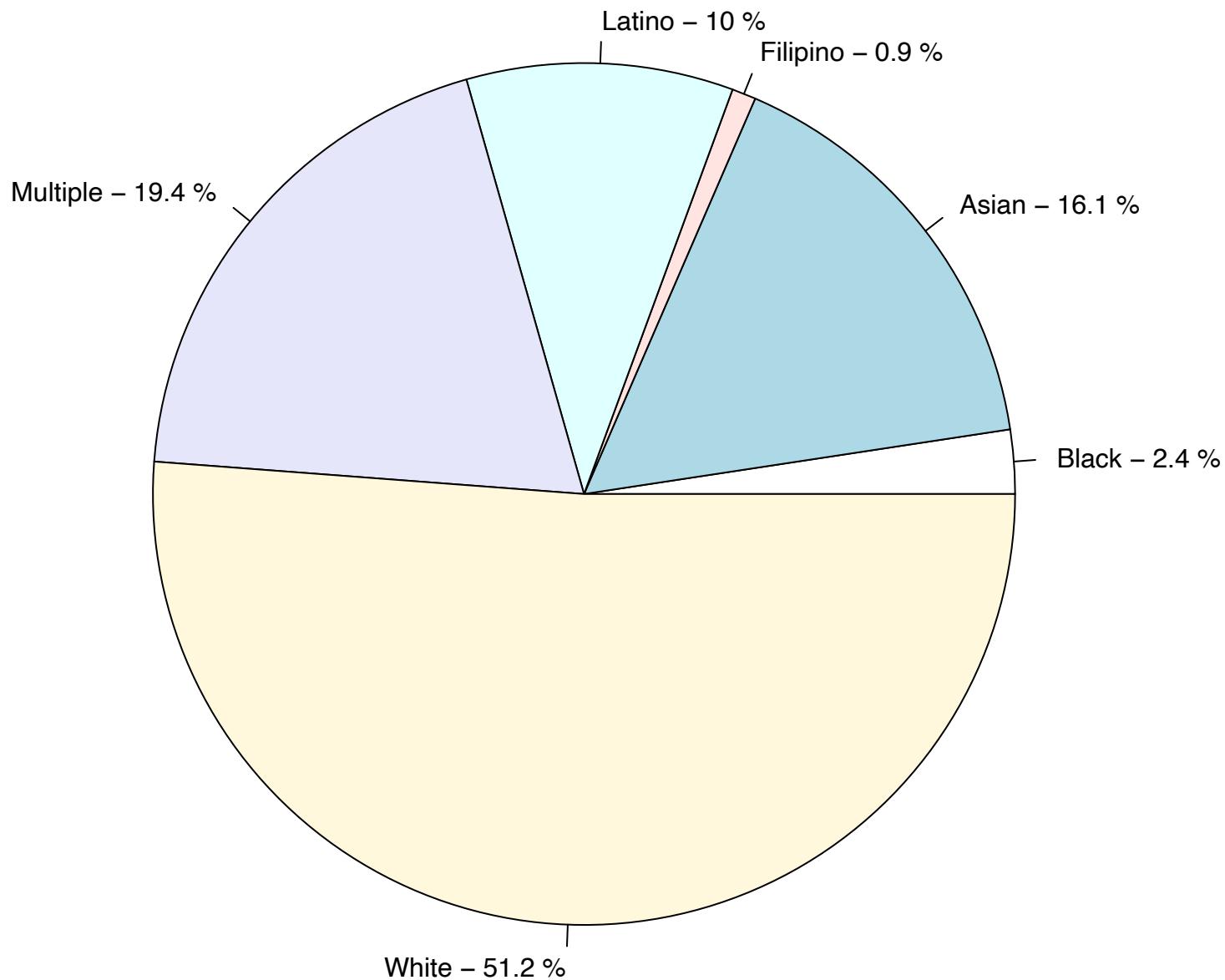
Year (Test ban in 2020, Test optional in 2021)

Key: Above Standard Near Standard Below Standard

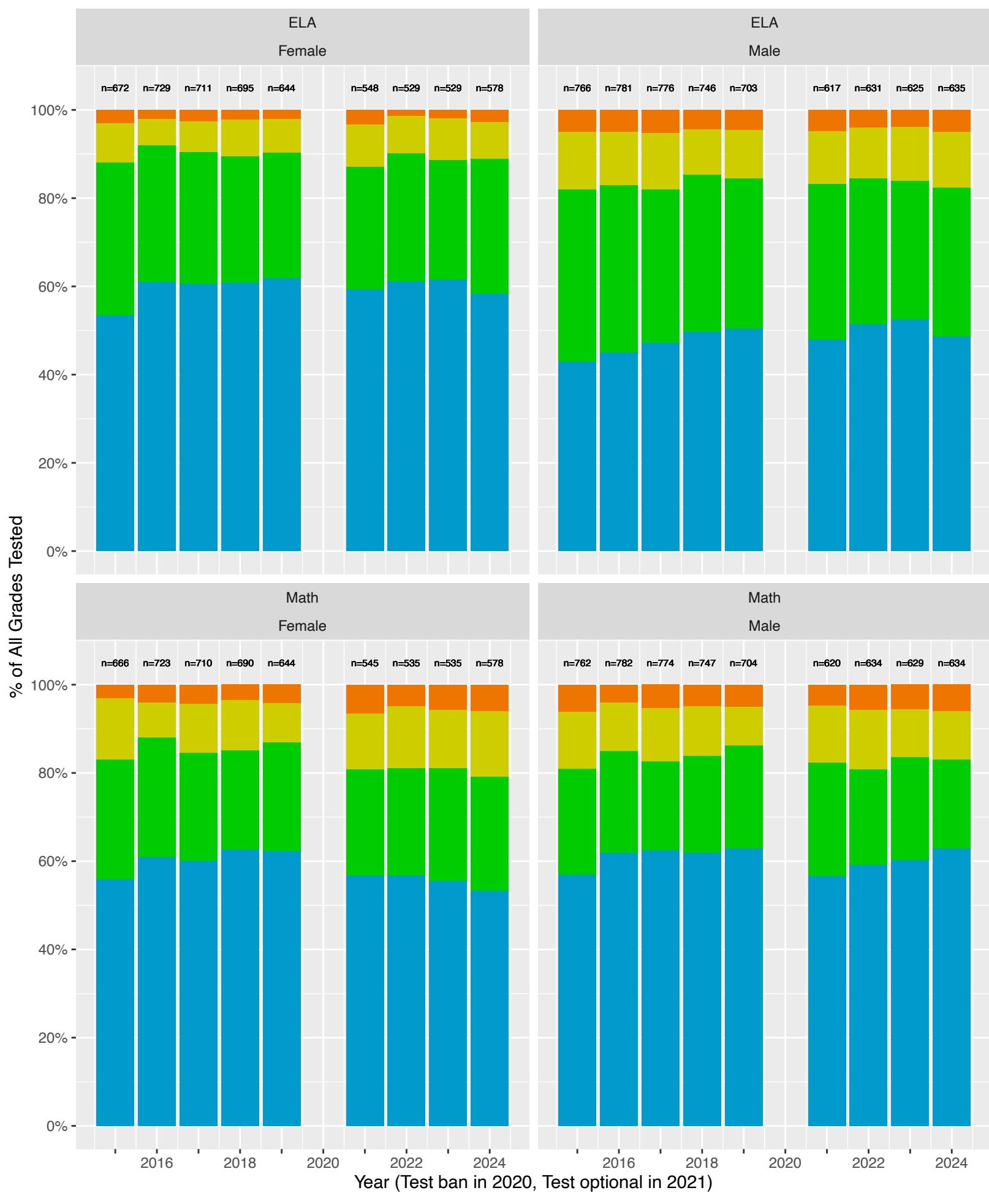
Piedmont Unified School District (Subject Area 4)



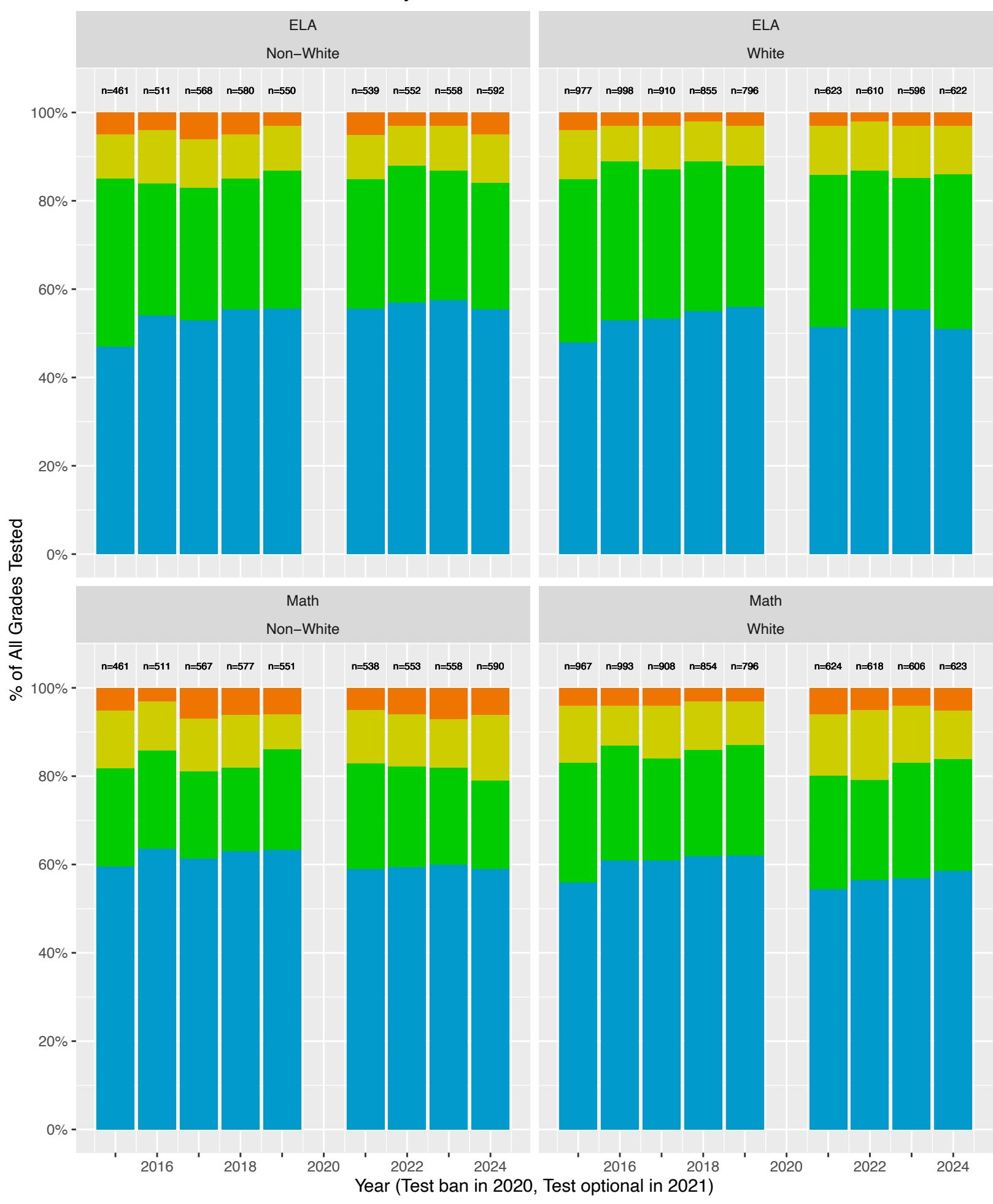
**Racial distribution of Piedmont Unified School District students
tested in 2024**



Piedmont Unified School District by Sex

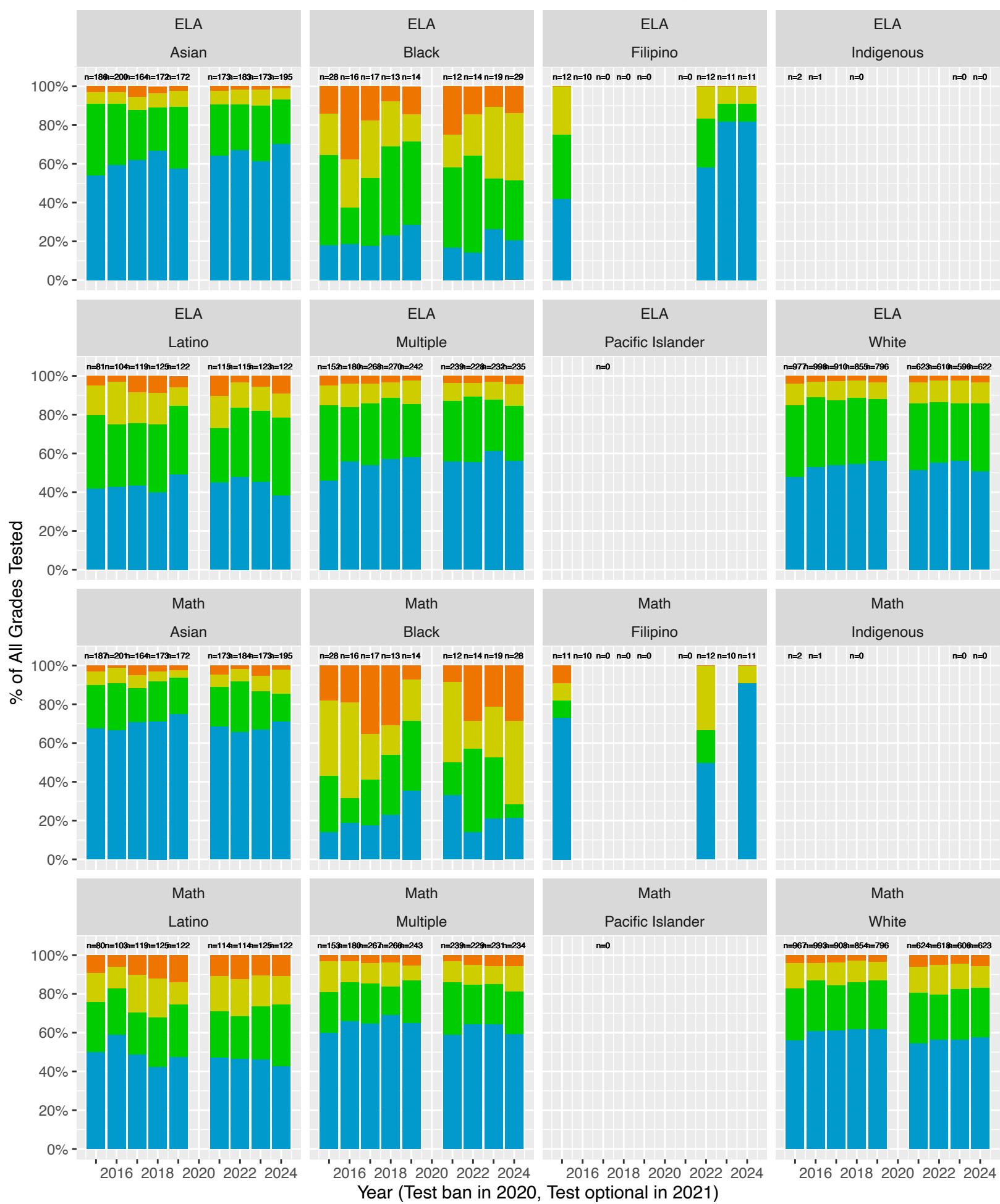


Piedmont Unified School District by Non-White + White



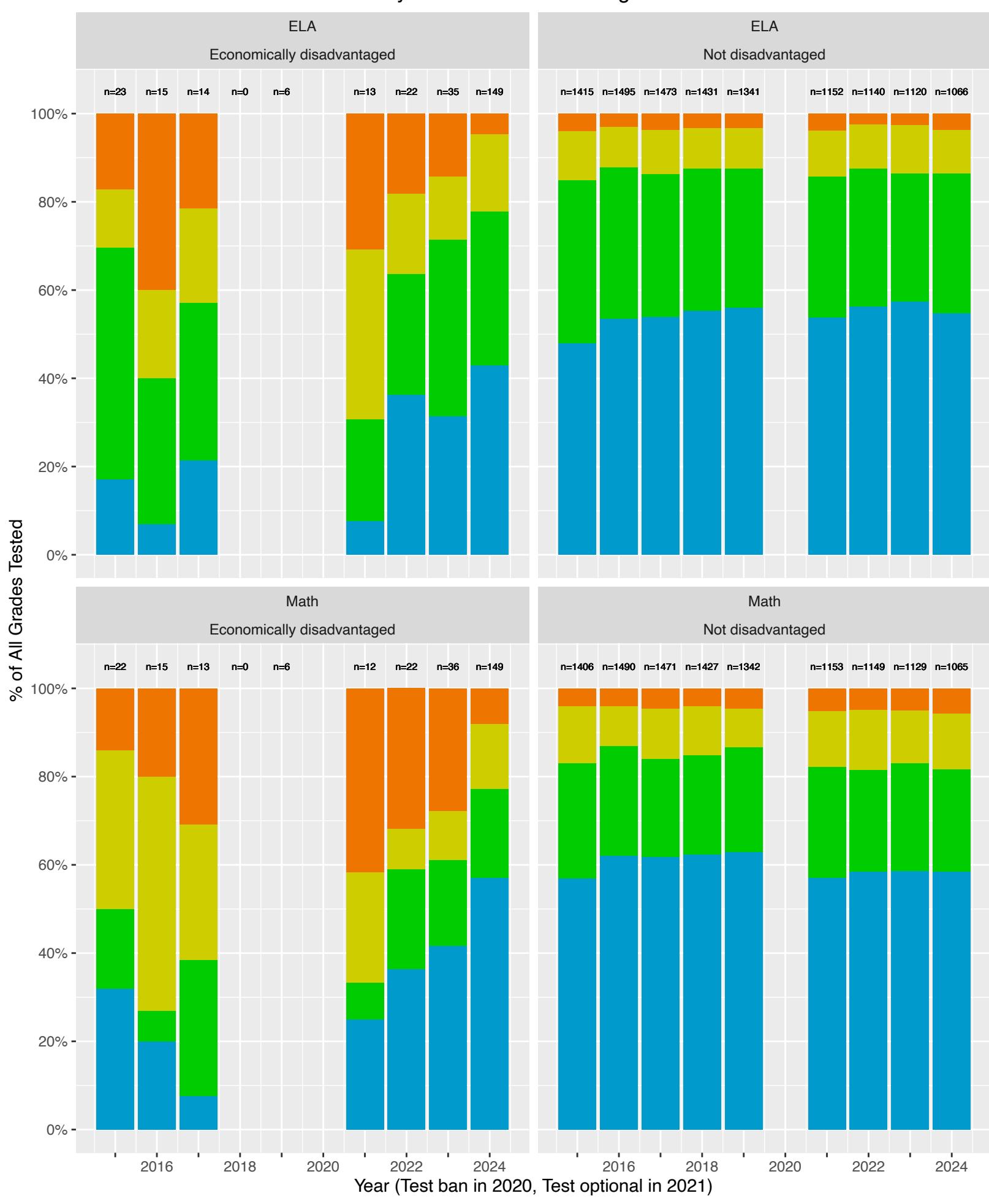
Key: Standard Exceeded Standard Met Standard Nearly Met Standard Not Met

CAASPP Test Performance: Piedmont Unified School District by Race



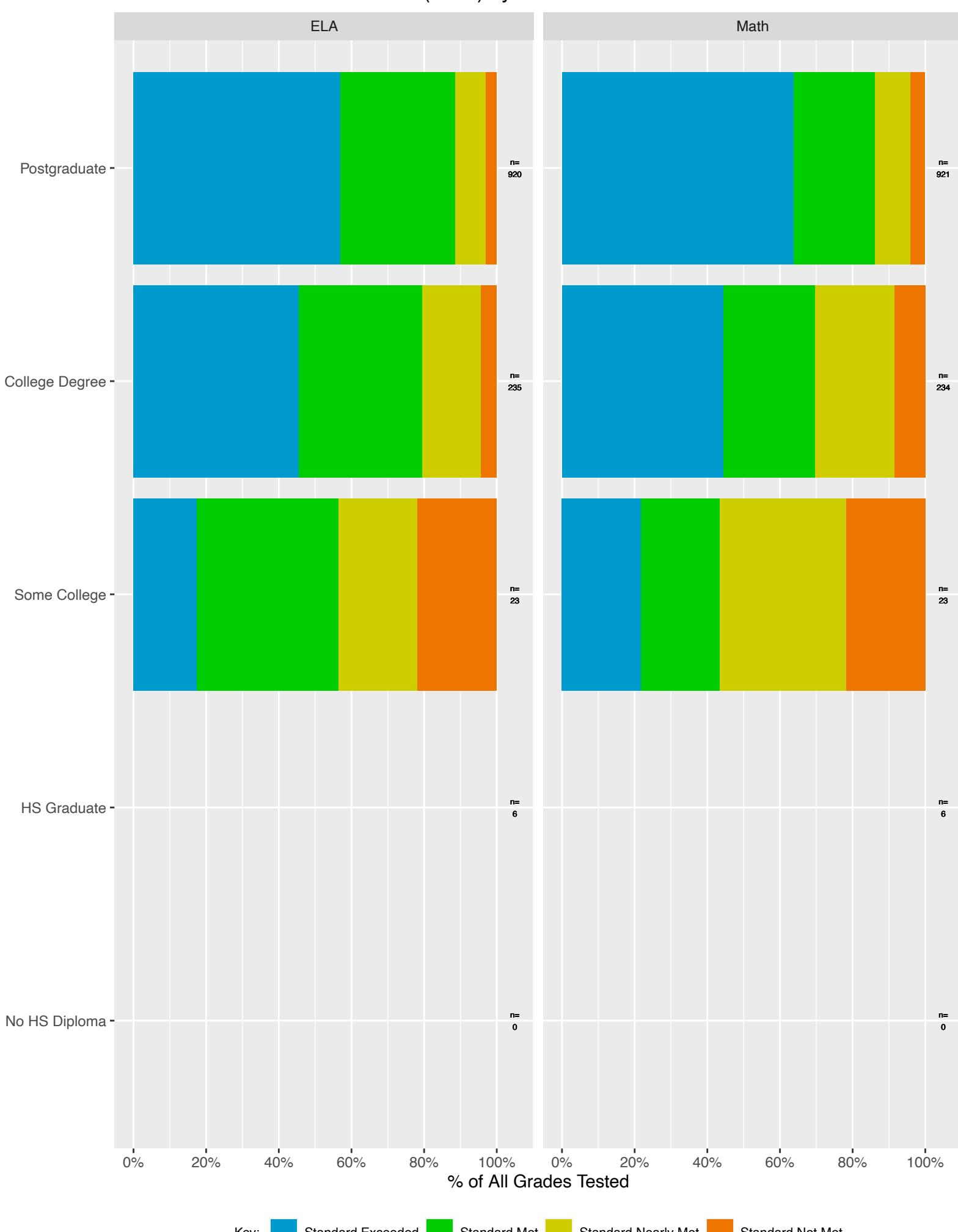
Key: Standard Exceeded Standard Met Standard Nearly Met Standard Not Met

Piedmont Unified School District by Economic Disadvantage



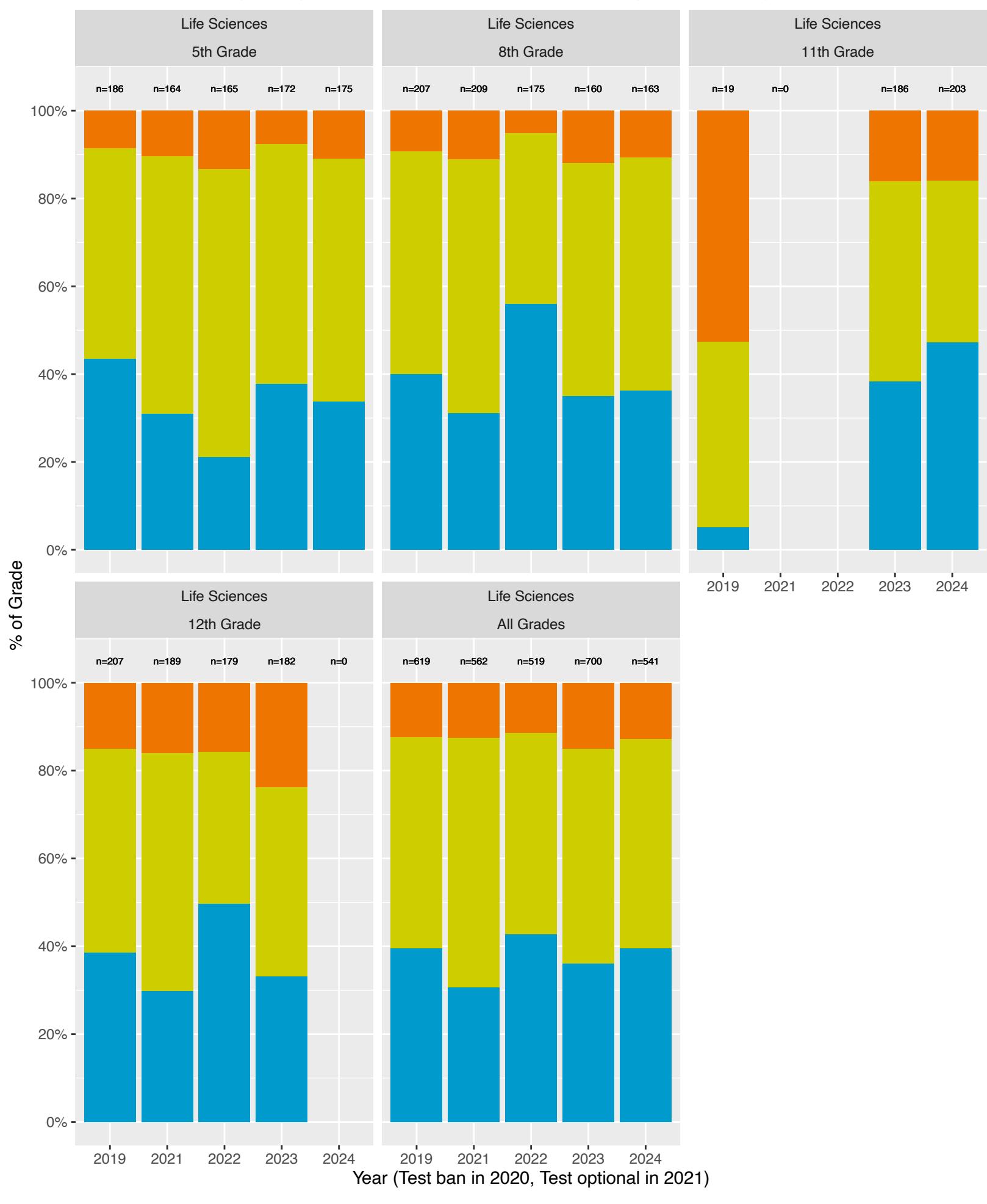
Key: Standard Exceeded Standard Met Standard Nearly Met Standard Not Met

Piedmont Unified School District (2024) by Parent's Education Level



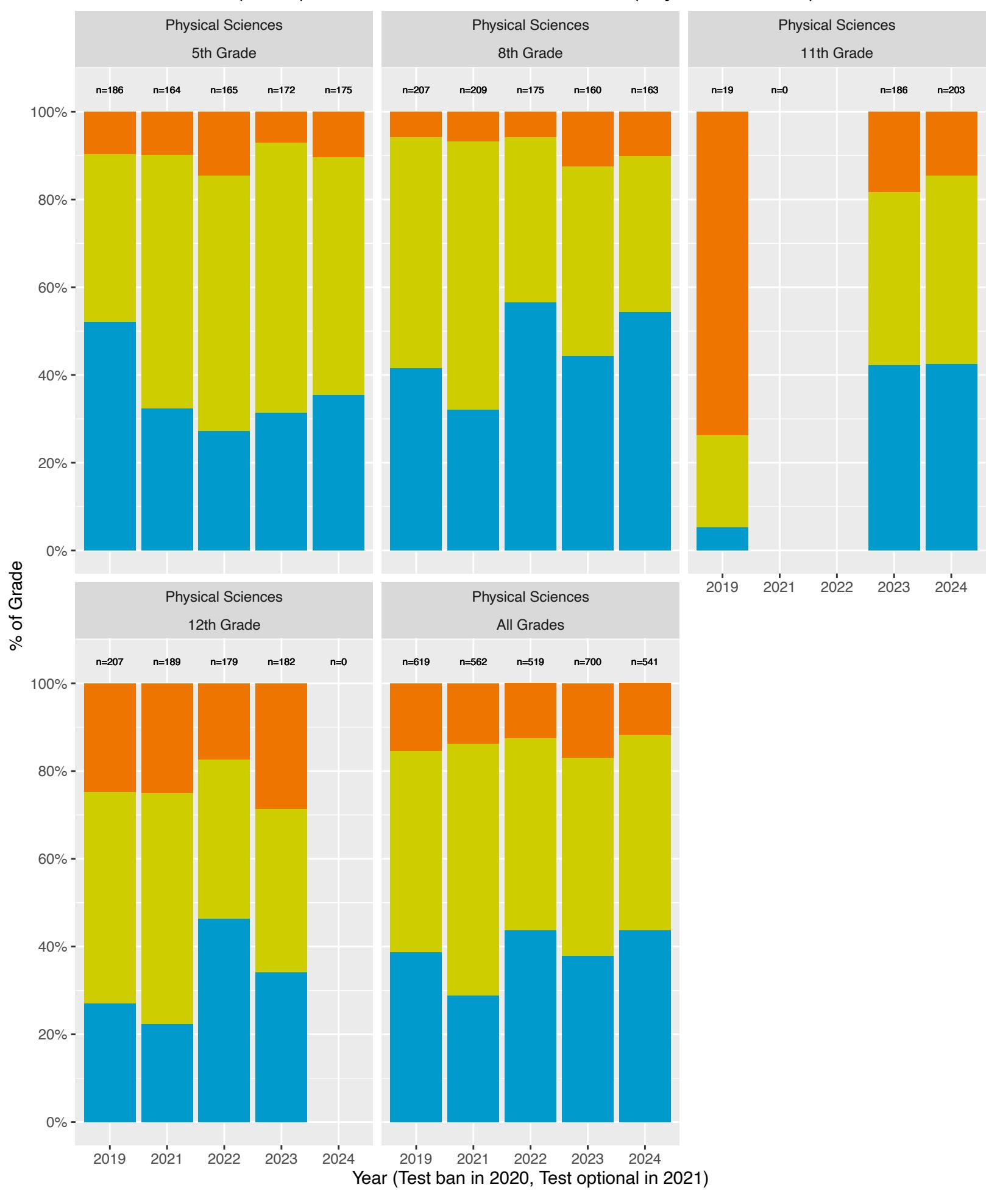
Key: Standard Exceeded Standard Met Standard Nearly Met Standard Not Met

CA Science Test (CAST): Piedmont Unified School District (Life Sciences)



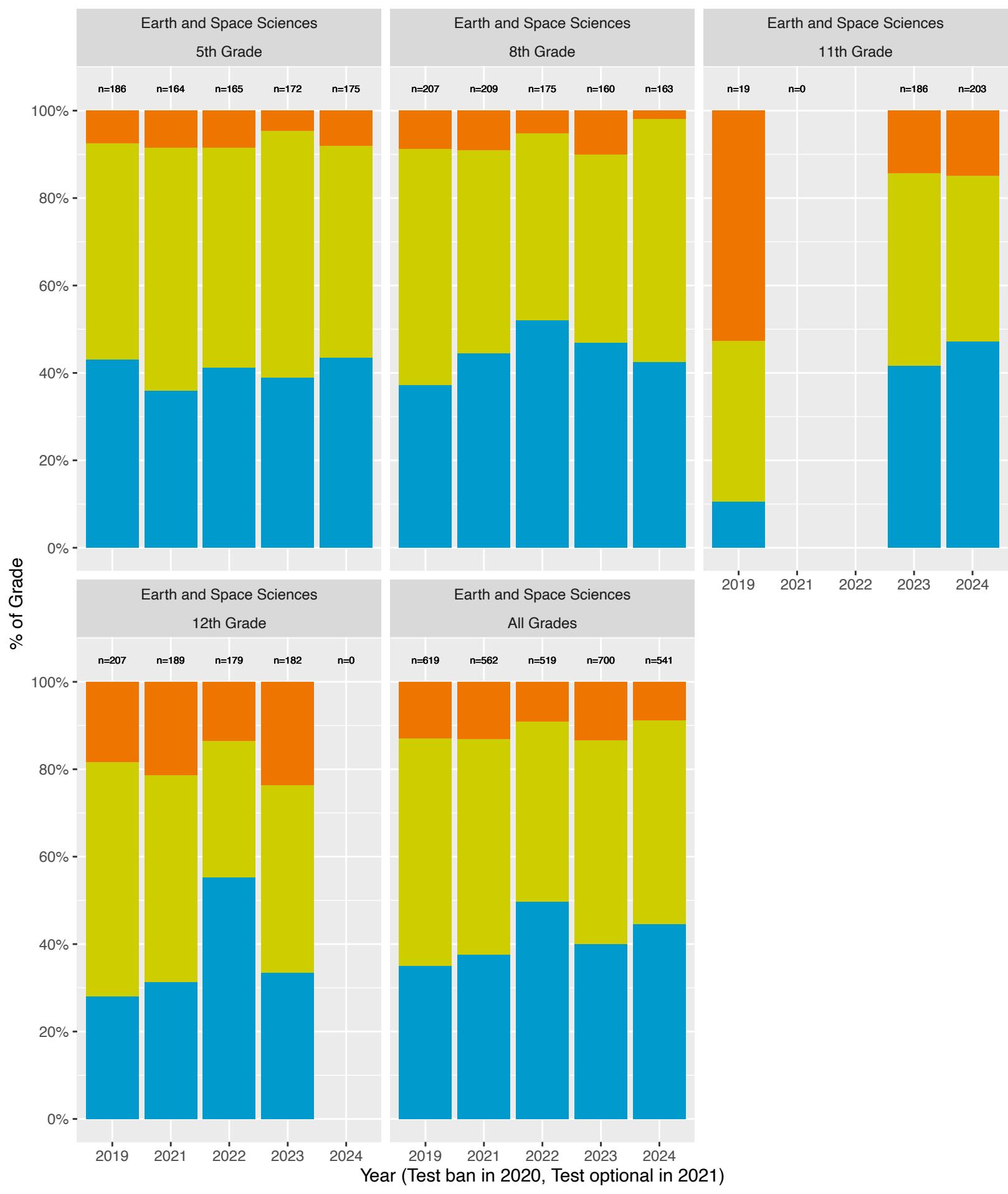
Key: Above Standard Near Standard Below Standard

CA Science Test (CAST): Piedmont Unified School District (Physical Sciences)



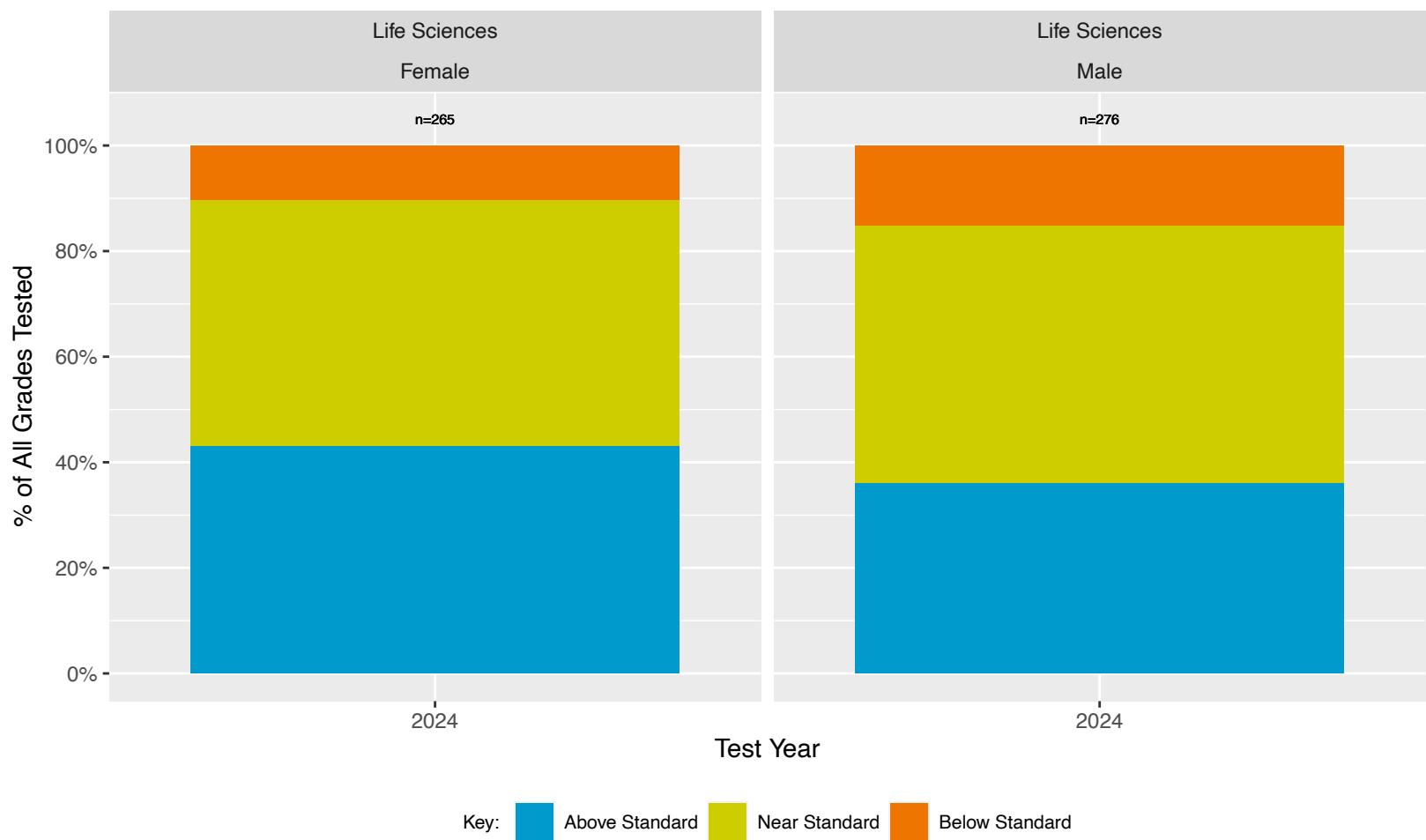
CA Science Test (CAST):

Piedmont Unified School District (Earth and Space Sciences)

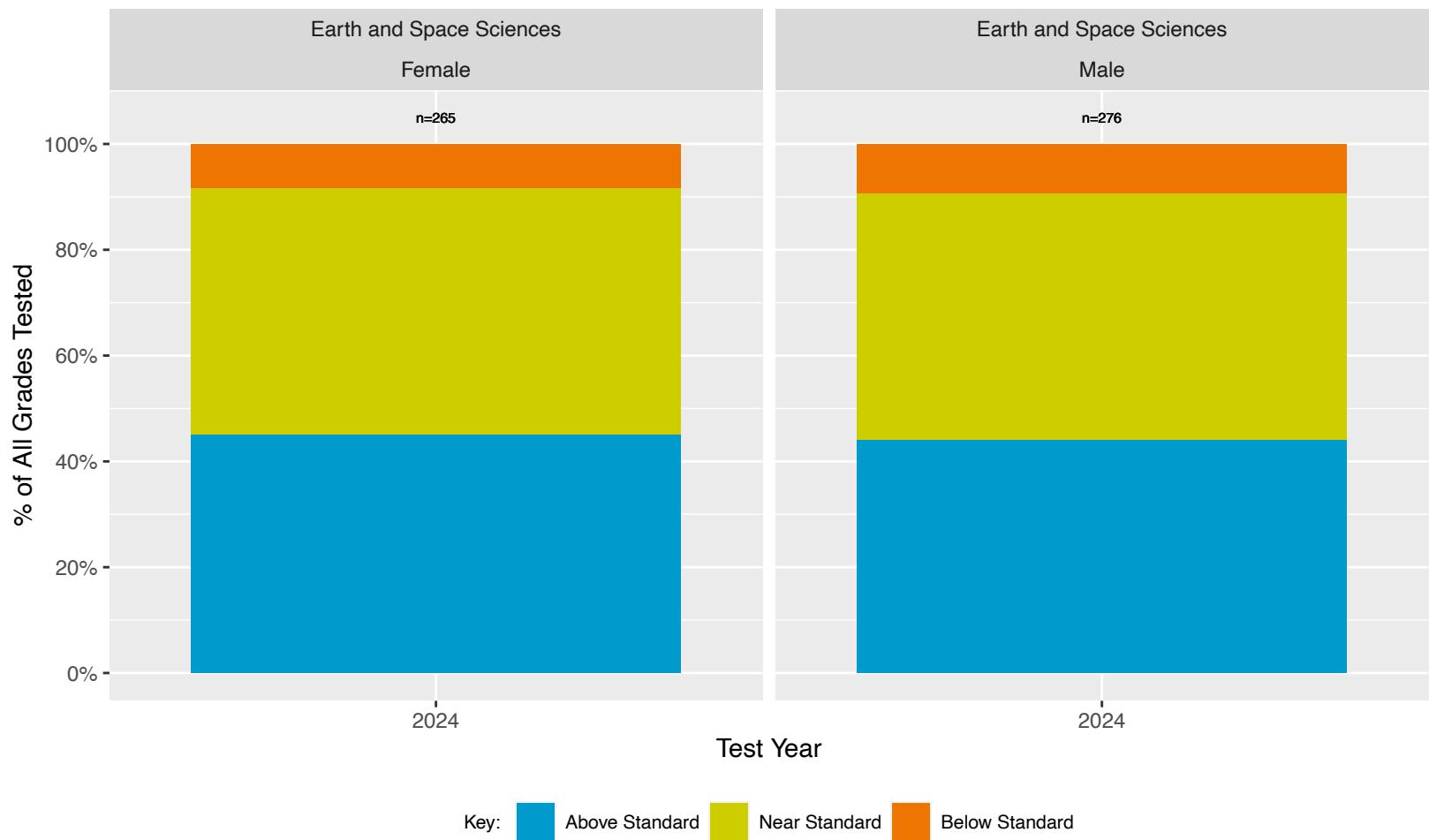


Key: Above Standard Near Standard Below Standard

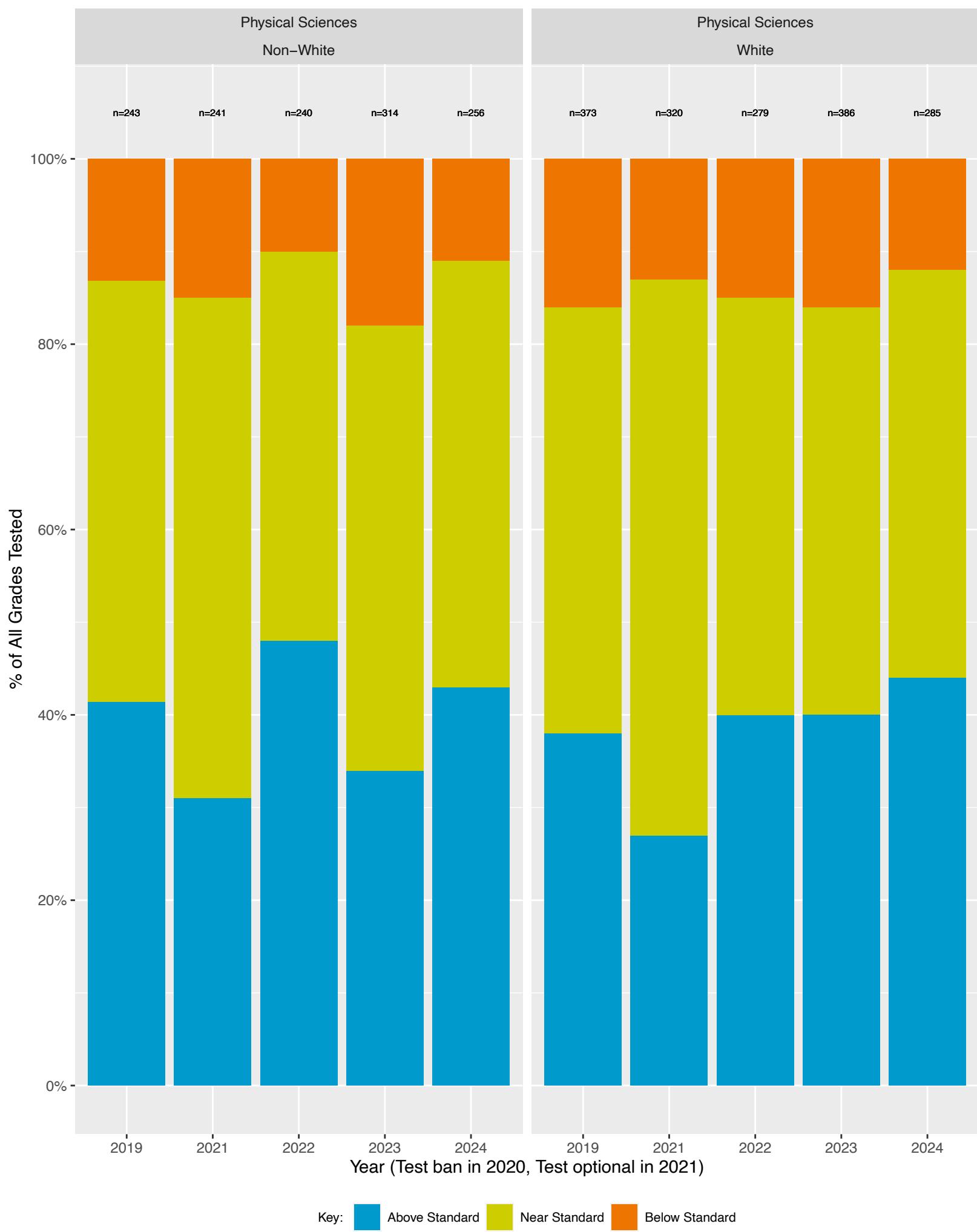
CA Science Test (CAST): Piedmont Unified School District (Sex)



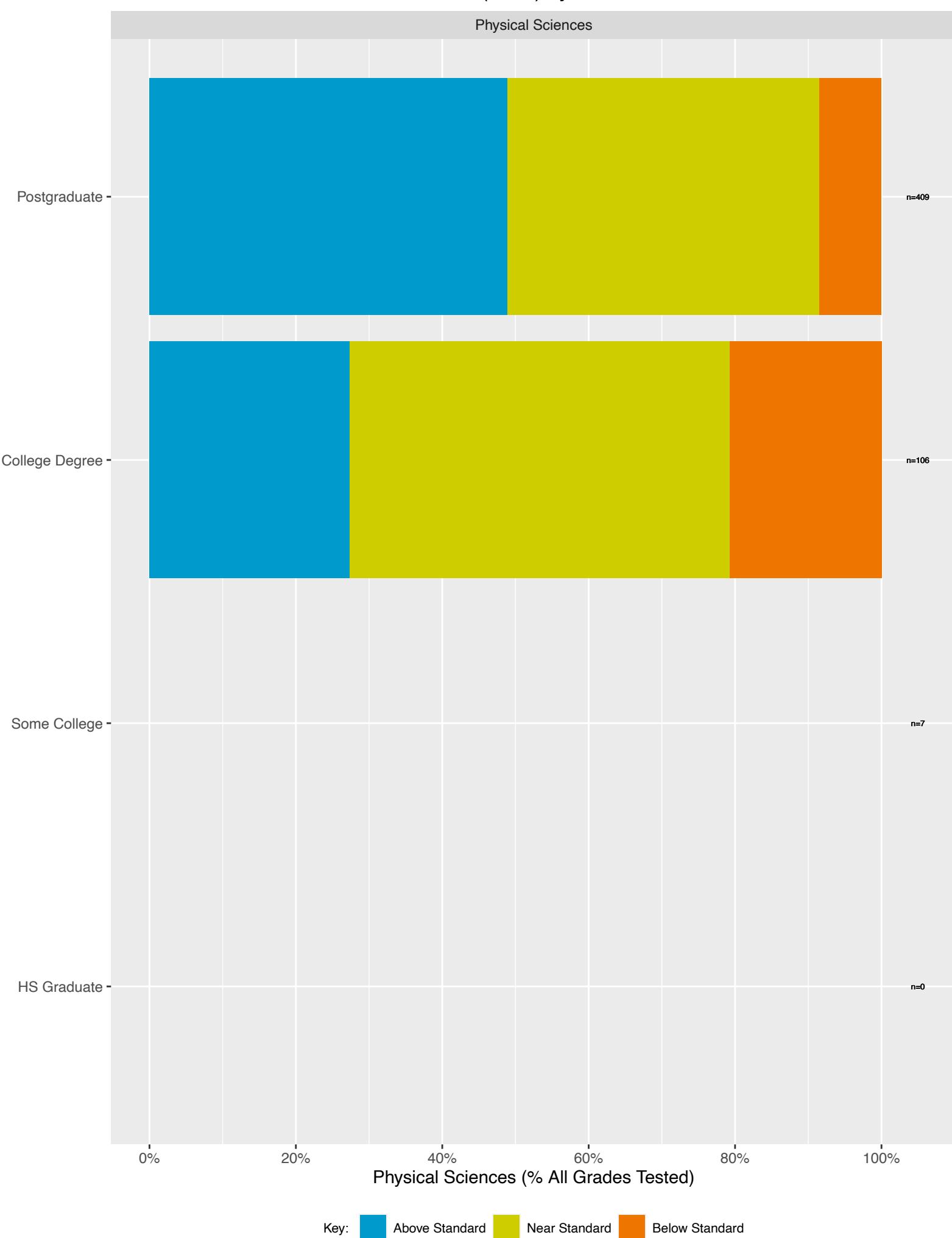
CA Science Test (CAST): Piedmont Unified School District (Sex)



CA Science Test (CAST): Piedmont Unified School District by Non–White + White



Piedmont Unified School District CAST (2024) by Parent's Education Level



Parents for Educational Excellence in Piedmont

Analysis by: Hari Titan, Ph.D.

Email: ExcellencePUSD@gmail.com

CAASPP source data & validation: bit.ly/CAASPPComparison

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About Hari

I was an early pioneer in neural network and risk modeling, with applications across various industries, including credit risk, e-commerce payment fraud, and merchant underwriting. I hold a patent for developing an explainable AI (xAI) algorithm that generates interpretable reasons to support scores produced by neural network models. This groundbreaking algorithm was first implemented in 1995 within the Falcon™ credit card fraud system and later used in other risk management products. These contributions were made during my tenure at HNC Software, now a part of Fair Isaac (FICO).

With nearly 20 years of experience in customer profiling, risk modeling, and data analytics, I have developed models to assess risk across a wide range of financial products, including credit cards, home equity lines, business loans, and insurance premiums. My work has supported financial, insurance and real estate (FIRE) institutions such as Wells Fargo, Bank of America, VISA, GeoVera Earthquake Insurance, and Vrbo home rentals.

In addition to my technical expertise, I bring extensive consulting experience, having worked directly with C-level executives at organizations ranging from small startups—many of which were later acquired—to established enterprises. Currently, I serve as an M&A Advisor for LINK Silicon Valley, where I help small and medium-sized business (SMB) CEOs prepare their companies for quick and profitable sales.



I have a Master's in Mathematics and Ph.D. in Computer Science from the University of Waterloo.

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