



MONTECITO UNION SCHOOL FOUNDATION



ANNUAL REPORT 2025-2026

Prepared by Kendle Evans & Bruce Frey on 10/01/2026
MUSF | 385 San Ysidro Road, Montecito, CA 93108
www.musfoundation.com



Kendle Evans

MUSF President

Bruce Frey
Vice President

Joy Perry
Treasurer

Mally Chakola
Secretary

Tanya Newlove
Sponsorship

Casey Kallenbach
Special Events

Jennie Burkart
School Programs

Natalie Mutz
Annual Giving

Jason Cobb-Storck
Community Events

Vanessa Scarlett
Teacher Member

Lindsay Parton
School Spirit

Megan Gray
Member At-Large

Carolyn Fitzgerald
Member At-Large

BUILDING ON OUR SUCCESS

Dear Families,

On behalf of the Montecito Union School Foundation Board, I wanted to say thank you for the incredible support you have shown us and the school. We are looking forward to the upcoming school year with an enormous amount of excitement and optimism! MUSF exists for one simple reason: to ensure every MUS student has access to exceptional educational experiences that go above and beyond what the district can provide on its own.

In the past year, we have seen such an outpouring of generosity, in both volunteer time and donations, with every single dollar and hour volunteered being a critical part of stabilizing our school's financial health and resources. With over \$1.3M in donations and revenue in the last fiscal year, our community worked together to reach historic levels of support. Those inputs go directly to impact our school and our children's programming.

Together, we invest in our children, support our exceptional teachers, strengthen our community, and ensure that MUS continues to provide an educational experience unlike any other. Our Foundation is powered almost entirely by volunteers, and we ask that you consider getting involved throughout the year, whether for just an hour or by taking on a significant commitment.

We look forward to working with you this year and are excited to share some of our collective successes in the following report.

With gratitude,

A handwritten signature in blue ink, appearing to read 'Kendle Evans'.

Kendle Evans

Montecito Union School Foundation

WHAT DO WE SUPPORT?

366 Students
251 Families



SCHOOL PROGRAMS

Art at Lunch
Nature Lab Club
Garden Club
Running Club
Sowah African Drumming
Poets & Artists in Residence
Lost & Found
Room Parents



SPECIAL EVENTS

Carnival
Gala



COMMUNITY EVENTS

Back to School Picnic
Enchanted Evening
Pancake Breakfast
Booklab
Multicultural Food Fair
6th Grade Graduation



SCHOOL SPIRIT

Montecito Community Events
Lounge Fairy
MUS Gear
New Family Event
New Student Tour
Staff Appreciation Luncheon



Montecito Union School Foundation

WHO WE ARE

The Montecito Union School Foundation (MUSF) was founded in 2018 as a 501(c)3 merging two separate predecessor organizations, the MUS PTA and the Montecito Education Foundation.

OUR VISION

Our vision is that your donations, partnered with public dollars, maximize Montecito Union School's ability to launch inspired thinkers who positively impact the world.

OUR MISSION

TO ENRICH THE STUDENT EXPERIENCE BY



ENHANCING ACADEMIC, ATHLETIC, ARTS AND MUSIC PROGRAMS



SUPPORTING TECHNOLOGY, CURRICULUM, AND CLASSROOM RESOURCES

OUR BOARD

WORKS TO ALLOCATE FUNDS AND ACHIEVE SUCCESSFUL OUTCOMES BY APPLYING THE FOLLOWING GUIDING PRINCIPLES:



Impact for All



Enrich Student Learning



Fiscal Responsibility

MUSF FUNDS PROJECTS THAT BROADLY ENHANCE EACH STUDENT'S EDUCATIONAL EXPERIENCE, WITH THE BOARD APPROVING PROPOSALS AND THE PRESIDENT OVERSEEING EXECUTION WITH SUPERINTENDENT ANTHONY RANII.

FINANCIAL HIGHLIGHTS

NET 2025-26 PROCEEDS



\$1,367,406

REVENUE SOURCES

Gala and Mustang Fund continue to be our largest income generators, followed by the remaining MUSF events

INCOME BREAKDOWN

Mustang Fund **\$912,535**

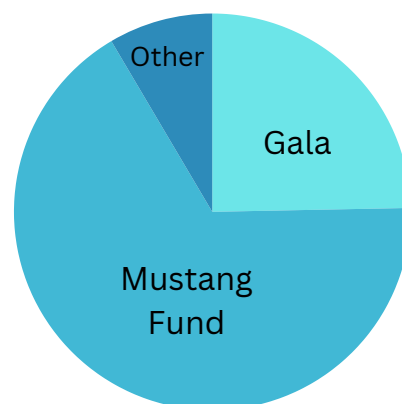
The highest total raised in MUSF history

Spring Gala **\$337,899**

Auction, Paddle Raise, Ticket Sales, Sponsorships

Other Income **\$116,972**

Carnival, Community Events, Merchandise Sales, Other



YOUR MONEY MATTERS

97%

- 97% of 2025/26 revenue funded MUS grants, programs, projects, and events
- Only 3% went toward administrative and operational costs
- Thank you to our parent volunteers for their time and dedication in keeping overhead low

THANK YOU TO OUR VOLUNTEERS



The MUS community contributed not only financially but with their valuable time. We want to thank the numerous volunteers who make these social and educational events successful.

We continue to have a need for volunteers, reach out to us at www.musfoundation.com on the “Get Involved” page!

Gala **Art at Lunch** **Running Club**
 Sowah African Drumming Poets & Artists in Residence
 Diversity Club Food Fair
 Lounge Fairy **STEAM Night** **Garden Club**
 Book Lab Belltower Activities
 6th Grade Party Nature Lab Club Kindergarten Assessments
 Pancake Breakfast Toy Drive
 Enchanted Evening Dance
 Room Parent Coordination Staff Appreciation Lunch
Carnival Partybooks/Socials
 Back to School Picnic
 Graduation Reception



**WE DID
IT!**

2025-2026 PROJECT

**Rebuild Cash Reserves:
“Keep MUS, MUS”**



The Ask:

Following over \$9M of reserve expenditures due to a legal settlement, raise \$500K from our community to support district reserves and operational needs.



The Result:

With over \$900K in donations, our community was able to make a substantial commitment to the district reserves while maintaining our current MUS/MUSF programming.

Additionally, MUSF was able to fund \$30K for the next 3 years for teacher development days due to overwhelming support!



Thank you

TO ALL OUR DONORS WHO GENEROUSLY SUPPORTED



MUSTANG FUND

Water, Water, Everywhere

2026 - 2027 Project

The MUS Foundation continues to deliver on its commitment to the programs and events that define our community: Carnival, Art at Lunch, Garden Club, Sowah African Drumming, and more. These beloved traditions bring joy, creativity, and connection to our children, and keeping them thriving remains central to our mission.

We also understand that there are pressing needs of the school district that equally have impact on the experience of our students and staff.

The MUSF Board believes our Mustang Fund can make the greatest impact this year by investing in campus improvements that directly enhance the daily experience of our students and staff. While our students continue to enjoy the benefits of recent projects such as the Library and Fitness/Wellness additions, we are excited as an organization to deliver financial commitment to a new set of enhancements.

Our campaign this year is centered on two projects focused on WATER.



**WATER FOR
ALL**



**PROTECT OUR
CAMPUS**

INITIATIVES

#1: AVAILABILITY OF DRINKING STATIONS

The students have asked and we are listening!

As you may know from your children, MUS currently has several newer and beloved water drinking and filling stations across campus. Students choose to go to these specific ones throughout the day.

We are seeking to raise \$100,000 to replace, repair and install new upgraded filtered water stations throughout the campus, including the installation of water in needed areas. Easy access to fresh, filtered drinking water is essential to our students' health, comfort, and well-being throughout the school day and during after school activities.

This investment will help ensure that students and staff have convenient access to safe, great-tasting drinking water across campus, supporting a healthier school environment and a lasting improvement to our shared facilities.

#2: SUPPORT CRITICAL ROOF PROJECTS

Additionally, we are goaling to raise \$300,000 toward the replacement of the roofs on Buildings C and D. Building D houses our 4th-grade classrooms, music program, and school offices, while Building C is home to our 5th-grade classrooms.

The estimated total cost of the project is \$1.7–\$2 million, with a more precise figure expected in early spring 2027. Your support will help us take an important step toward protecting these essential learning and working spaces, ensuring our students, teachers, and staff have safe, reliable facilities for years to come. As we continue to rebuild the district reserves, the MUSF Board feels this is a critical contribution we can make.



Dear MUS Community,

We are thrilled to be the chairs of this year's Mustang Fund! Both of our families have been impacted in such positive ways by our school, and we are thankful to be able to give back with our roles on the Montecito Union School Foundation board. We are grateful to the entire school community, administration, staff, and MUSF Board members for forthcoming support of this year's campaign.

With an urgent call to action last year the entire MUS community showed up with a level of generosity that was historic. With a total raise of over \$900K, we were able to support our school in building its financial reserves for critical programs and operational needs that impact our children's daily life. THANK YOU for such an incredible result!

We are excited to kick off this year's campaign to continue the work of our organization in support of the school we love. We will continue our focus on shoring up the school's financial reserves for critical projects by supporting a critical roofing replacement project. We are also excited to take action on an infrastructure improvement that came from hearing the needs and feedback of our students and staff - delicious drinking water availability across campus. This work will round out many of the campus improvements our fundraising has driven, most recently including our outdoor fitness and wellness stations.

Every person's support is vital to making MUS exceptional. Over $\frac{2}{3}$ of our MUSF revenue is delivered from the Mustang Fund, so participation, small or large, is critical. Our ask is that each member of our community consider a donation as a signal of our commitment to the school and its impact on our children's lives - our gratitude for your participation is immense.

Thank you in advance for your support and commitment to our cause.

Sincerely,

Natalie & Carolyn

MUSF Mustang Fund Chairs



NATALIE MUTZ



CAROLYN FITZGERALD

THIS YEAR'S MUSTANG FUND

GOAL: WATER, WATER, EVERYWHERE

Please consider helping us fund these critical campus needs that immediately impact the quality and enjoyment of our campus.

- Addition and replacement of filtered drinking water stations across campus buildings and outdoor facilities
- Weatherproofing and replacement of aged roofs on Buildings C & D - contributing to district costs of total project (estimate \$1.7 - \$2M)

THE ASK! \$400,000+

100% household participation - any contribution matters!

\$1,500 per student recommended contribution

HOW TO GIVE!

Visit www.musfoundation.com

Drop off a check at the school

Or scan QR code



TIMELINE

- ▶ OCT 2nd: MUSTANG FUND OPENS
- ▶ 7 WEEK DURATION: PLEDGE EARLY!
- ▶ NOV 20th : MUSTANG FUND ENDS

FAQ'S



How does MUSF handle deficits?

MUSF maintains reserves equal to one year's operating budget to manage cash flow and cover shortfalls. This ensures programs and commitments to students are never interrupted.

At times, MUSF may show a planned net loss when funds raised in a prior year are spent later; this is intentional and part of our budgeting process.

Does MUSF have an endowment?

No. Instead of a permanent endowment, MUSF keeps a flexible reserve equal to roughly one year's budget. This protects the school during financial challenges and ensures funds are used quickly to benefit students rather than being locked away.

What happens with a surplus?

Surpluses are either dedicated to upcoming approved projects or set aside as unrestricted funds for future needs. Our goal is to turn donations into immediate impact for students.

How are projects selected?

The superintendent works with the board, teachers, and staff to identify needs. Proposals are developed and refined with cost estimates and timelines. The MUSF Board reviews and votes for final approval. Fundraising begins to support the chosen projects. This process ensures all projects directly benefit students and align with our mission.

Why donate if my child is in 6th grade?

Past families gave to create opportunities your child enjoys today. By donating, you continue this cycle, ensuring future students have the same enriching experiences for years to come.

How do I get involved?

Please go onto our website www.musfoundation.com and go to the "Get Involved" tab. Also please subscribe to ParentSquare. All of our monthly and event volunteering needs go out via this parent app.



YOU ARE WHO MAKES MUS SUCH AN INCREDIBLE PLACE FOR OUR CHILDREN!

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