



FRIENDS of MANDARIN IMMERSION PROGRAM
BOARD MEETING MINUTES: 09/10/2026
 24861 Vista Magnifica Laguna Niguel, CA 92677 *Virtual
 Called to order: ~6:05 PM

Roll Call:

2026-2027 MIP Board Members

<u>Officer</u>	<u>Present/Not Present</u>	<u>Officer</u>	<u>Present/Not Present</u>
President: Ken Chen	P	Secretary: Ghazaleh F. Jazi	P
Vice President: Jennifer Gerber	P	Community Liaison: Julianne Finkelburg	P
Treasurer: Wendy Lin	P	Co-Newhart Liaison: Iris Lai	P
Financial Controller: Edward Lu	NP	Co-Newhart Liaison: Vanna Tran	P
Communications Director: Cindy Ong	P	Cap Valley Liaison: Stacey Cartledge	NP
Outreach Director: Jessica Yang	P	Parliamentarian: Janey Sherman	P

Other Attendees:

- Amanda Yeung
- Uma Mainprize
- Pauline Baytion
- Derek Fleming
- Johanna Hokulani Yang
- Salina Christian
- Linda Kim
- Rance
- Deeann D. Crouch
-
- Janai Ederaine
-

Minutes

- **Acceptance of Previous Meeting Minutes:** Ken moved to accept the minutes from the May 28 meeting, Wendy seconded the meeting minutes.



Key Discussions and Approvals

● Interdistrict Transfer Policy Crisis

- The CUSD is implementing basic aid funding in 2026-27, which will eliminate interdistrict transfer students after this school year. This directly impacts over 58 students at Bergeson (approximately 20% of enrollment).
- New interdistrict transfer students will not be accepted once basic aid consolidation occurs in 2026-27.
- Current interdistrict transfer students should be able to finish the MIP program through 12th grade if they remain in the program but the CUSD has yet to confirm.
- Siblings of interdistrict transfer students will be evaluated case-by-case on an individual basis, not automatically admitted.
- The CUSD has not yet provided written confirmation of interdistrict transfer policy details.

● School Consolidation Committee

- The CUSD consolidation committee will review Bergeson as the first school on the consolidated list in January 2027.
- The MIP board will send an advocacy letter to both the consolidation committee and consulting firm highlighting MIP's unique value and mission.

● Staffing and Budget Allocations

- The board unanimously approved 3-hour an additional aide for 4th-5th grade combo class at Bergeson, costing approximately \$12,000 for the school year. The 3-hour aide coverage will provide four and a half hours daily support for the 4th and 5th combo class.
- The board unanimously approved a second 3-hour aide to support additional teacher needs, with total cost not exceeding current surplus.
- The board unanimously approved 7 PLC (Professional Learning Community) release days for each 4th and 5th grade teacher at \$225 per day (total ~\$4,725).
- The board unanimously approved a \$500 budget for teacher appreciation gathering.
- The board unanimously approved the Level Learning platform for Newhart Middle School with combined Bergeson/Newhart licensing. The combined licensing cost would be \$9,450 plus \$2,000 in-person teacher training, which brings the cost to \$11,450. The pre-approved budget for Bergeson alone was \$11,025. Adding Newhart brings the variance to approximately \$425 over budget.



Program Updates and Enrollment

- **Bergeson Elementary School - Principal Dr. Linda Kim - P**
 - Kindergarten enrollment is growing with continued recruitment efforts and Bergeson continues active recruitment with expectation of growth throughout the school year.
 - Google search optimization needs to be in place by the district office to show Bergeson as "Mandarin Immersion school" in the area.
 - Many families in CUSD are unaware that Mandarin Immersion is an educational option available to them, even those in Laguna Niguel.
 - 5th grade science class has 47 students - district declined to provide an additional aide support.
- **Newhart Middle School - Principal Bajorek - NP, Assistant principals, Mrs. Ederaine and Dr. Crouch - P**
 - Newhart completed all introductory procedures for students and held a MIP party at the STEAM building
 - Newhart students acclimating well to school procedures.
- **Capo Valley High School - Principal John Misustin - NP**

Budget and Finances

- **2025-2026 Funds Raised and Spending:** Wendy presented the funds raised and spending for the 2025–2026 school year, covering the period **June 15, 2025 through June 16, 2026.**



2025-2026 School Year					
Actuals 06/15/2025 - 06/16/2026 FINAL					
REVENUE					
Direct Giving	\$ 193,612.09				
Corporate Contributions	\$ 34,525.91				
Gala Income	\$ 71,072.08				
Fundraisers	\$ 41,584.58	Spirit Wear, Bake Sale, Amazon			
Interest Income	\$ 26.85				
Total for Revenue	\$ 340,821.51				
COST OF SALES					
Fundraiser COGS	\$ 15,809.82				
Gala COGS	\$ 36,861.34				
Total Cost of Sales	\$ 52,671.16				
GROSS MARGIN	\$ 288,150.35				
CURRICULUM EXPENSES					
Bergeson iChinese Reader (K-1)	\$ 1,119.72				
Bergeson Level Learning (2-5)	\$ 11,025.00				
Newhart Mandarin Subscriptions	\$ 1,014.00				
Total for Curriculum Expenses	\$ 13,158.72				
STAFF EXPENSES					
Bergeson Instructional Assistants	\$ 136,682.00	Fan (21,873), Keyvan (52,860), Loy (22,973), Luu (22,973), Smith (16,003)			
Bergeson Professional Development	\$ 2,405.00	Substitute Teachers			
Newhart 2 Mandarin Classes	\$ 61,656.00	2 sections with Loh			
Total for Staff Expenses	\$ 200,743.00				
ON-CAMPUS CULTURAL & ENRICHMENT OPPORTUNITIES					
Bergeson Lunar New Year	\$ 500.00	Lion Dancers			
Bergeson Parties	\$ 1,371.23	Fall social, Trunk or Treat, Year end social, Classroom Competition Pizza			
Bergeson Library Books	\$ 300.00				
Bergeson Year End Social	\$ 649.73	Boba bar			
CVHS Global Cultural Edu Foundation	\$ 300.00	GCEF			
Newhart Lunar New Year	\$ 1,377.89				
Lunar New Year Art Contest	\$ 582.00				
Newhart 8th grade MIP promotion	\$ 54.95				
Total for Enrichment	\$ 5,135.80				
HARDWARE					
Bergeson Smartboard	\$ 5,550.00				
Total Hardware	\$ 5,550.00				
OPERATIONAL EXPENSES					
Tax Filing	\$ 763.00	Eaton Tax			
Quickbooks	\$ 864.23				
Fundraising platform fees	\$ 3,414.73				
D&O Insurance	\$ 1,952.00	FOMIP - D&O Policy			
Marketing/Promotional	\$ 100.00	OC Lantern Booth Fee			
Organizational Expenses	\$ 191.45	Insurance, Business Taxes, Organizational Costs			
Website	\$ 231.10				
Printing & Copying	\$ 100.00	FOMIP Banner?			
Total for Operational Expenses	\$ 7,616.51				
TOTAL EXPENSES	\$ 232,204.03				
NET INCOME (LOSS)	\$ 55,946.32				



- **2026-2027 Actual Spending vs Approved Budget:** Wendy presented the actual spending for the 2026–2027 school year compared with the approved budget. The information was provided as a guideline for determining the funding needs and budget for the 2026–2027 school year.

2026-2027 Revised Budget Approved on 9.10.2026 Board Meeting				
School Year 06/17/2026 - 06/16/2027		Fiscal Year (11/01/2024 - 10/31/2025) \$ Raised	\$	234,780
		Total Expenses Budgeted	\$	232,749
		Surplus (Shortfall)	\$	2,030
				updated: 9/10/2026 WL
	Budget Line	2026-2027 Approved	Actuals	
Mandarin Curriculum	Bergeson - Software & Subscriptions - Technology (iChinese Reader Grades K-1)	\$ 3,000	\$ -	
	Bergeson - Software & Subscriptions - Technology (Level Learning Grades 2-5, ~\$42pp)	\$ 3,948	\$ -	
	Bergeson- 2nd-5th STAMP Testing	\$ 6,160	\$ -	
	Bergeson/Newhart Level Learning In Person Teacher Training	\$ 2,000	\$ -	
	Newhart - Software & Subscriptions - Technology (Loh - Cheng & Tsui)	\$ 1,076	\$ 1,074	
	Newhart - Software & Subscriptions - Technology (Level Learning \$42 per student)	\$ 5,502	\$ -	
	Newhart - STAMP testing (~\$38pp)	\$ 5,250	\$ -	
	CVHS - STAMP Testing (~\$38pp)	\$ 3,570	\$ -	
	Mandarin Curriculum Total	\$ 30,506	\$ 1,074	
Staff	Bergeson Instructional Assistants (Fan, Keyvan, Loy, Luu, Smith)	\$ 143,565	\$ -	
	Bergeson Additional Part Time Aides (2)	\$ 24,486	\$ -	Per Dr. Kim \$12,243 for (1) aide 3hrs/day
	Teacher Professional Learning Community time	\$ 3,922	\$ -	
	Teacher conferences and training cost	\$ 5,000	\$ -	
	Teacher Professional Learning Community Time (Additional)	\$ 5,000	\$ -	
	MIP Teacher Appreciation	\$ 500	\$ -	
	Staff Total	\$ 181,973	\$ -	
On-Campus Cultural & Enrichment Opportunities	MIP Fall Social	\$ 2,310	\$ 463	
	Bergeson - All Parties	\$ 300	\$ -	
	Bergeson - Lunar New Year	\$ 770	\$ -	
	Newhart - Lunar New Year	\$ 2,750	\$ -	
	Newhart - Recognition Expenses	\$ 500	\$ -	
	CVHS - Lunar New Year	\$ 1,000	\$ -	
	CVHS - Recognition Expenses	\$ 1,000	\$ -	
	General Outreach Expenses (banners, misc. supplies, LNY art contest)	\$ 1,100	\$ 206	
	MIP End of Year Social	\$ 500	\$ -	
	Cultural & Enrichment Total	\$ 10,230	\$ 669	
Operational Expenses	Quickbooks subscription	\$ 840	\$ 76	
	Platform fees (Kindful/Bloomerang/Paypal)	\$ 3,600	\$ 626	
	Accounting/Tax Fees	\$ 1,000	\$ -	
	Insurance Fees (excludes gala)	\$ 350	\$ -	
	Directors and Officers Insurance	\$ 1,500	\$ -	
	Organizational Expenses	\$ 1,000	\$ 48	
	Website	\$ 250	\$ -	
	Marketing	\$ 1,500	\$ -	
	Operational Expenses Total	\$ 10,040	\$ 750	
Total Expenses		\$ 232,749	\$ 2,493	
Cost of Goods Sold				
	Fundraiser Expenses Total	\$ 18,500	\$ 500	
	Gala Expenses Total	\$ 40,500	\$ 8,052	
Total Cost of Goods Sold		\$ 59,000	\$ 8,552	

- **2026-2027 Budget Approved:**
 - MIP raised \$234,780 for the 2026–2027 school year.
 - Budgeted expenses totaled approximately \$207,000.
 - The expected surplus was approximately \$26,000.
 - The projected surplus provides funding capacity for additional aide positions.
 - Two three-hour aide positions are expected to cost approximately \$24,000 annually combined.



● 2027-2028 Approved Budget:

2027-2028 Budget Approved on 5.28.2026 Board Meeting		Fiscal Year (11/01/2025 - 10/31/2026) \$ Raised	\$ 146,535	<i>updated 9/10/2026 WL</i>
		Total Expenses Budgeted	\$ 219,994	
		Surplus (Shortfall):	\$ (73,459)	
	Budget Line	2027/2028 Approved		
Mandarin Curriculum	Bergeson - Software & Subscriptions - Technology (iChinese Reader Grade	\$ 3,200		
	Bergeson - Software & Subscriptions - Technology (Level Learning Grades	\$ 13,608		
	Bergeson- 2nd-5th STAMP Testing	\$ 6,776		
	Newhart - Software & Subscriptions - Technology (Loh - Cheng & Tsui - Bo	\$ 1,108		
	Newhart - STAMP testing (~\$38pp)	\$ 5,890		
	CVHS- STAMP Testing (~\$38pp)	\$ 5,016		
	Mandarin Curriculum Total	\$ 35,598		
Staff	Bergeson Instructional Assistants (Fan, Keyvan, Loy, Luu, Smith)	\$ 151,461		
	Teacher Professional Learning Community time. An informal on-campus co	\$ 6,000		
	Teacher conferences and training cost	\$ 5,000		
	Staff Total	\$ 162,461		
On-Campus Cultural & Enrichment Opportunities	MIP Fall Social	\$ 2,662		
	Bergeson - All Parties	\$ 330		
	Bergeson - Lunar New Year	\$ 847		
	Newhart - Lunar New Year	\$ 3,025		
	Newhart - Recognition Expenses	\$ 550		
	CVHS - Lunar New Year	\$ 1,100		
	CVHS - Recognition Expenses	\$ 1,100		
	General Outreach Expenses (banners, misc. supplies, LNY art contest)	\$ 1,210		
	MIP End of Year Social	\$ 550		
	Cultural & Enrichment Total	\$ 11,374		
Operational Expenses	Quickbooks subscription	\$ 880		
	Platform fees (Kindful/Bloomerang/Paypal)	\$ 3,800		
	Accounting/Tax Fees	\$ 1,030		
	Insurance Fees (excludes gala)	\$ 361		
	Directors and Officers Insurance	\$ 1,545		
	Organizational Expenses	\$ 1,100		
	Website	\$ 300		
	Marketing	\$ 1,545		
	Operational Expenses Total	\$ 10,561		
Total Expenses		\$ 219,994		
Cost of Goods Sold				
	Fundraiser Expenses Total	\$ 20,350		
	Gala Expenses Total	\$ 44,550		
Total Cost of Goods Sold		\$ 64,900.00		



- **Annual Fundraising (Jennifer):**

- **Core Objective:** Expanding fundraising efforts beyond the Annual Giving campaign while simultaneously increasing visibility around how contributions directly support classroom teachers and aides.
- **Alternative Giving:** Birthday party donation requests in lieu of gifts.
- **Promotional & Marketing:** Targeted promotional materials, dedicated newsletter updates, and a visual progress tracker (Thermometer).
- **Expanded Events:** Additional fundraising campaigns and community events throughout the year.

- **Outreach Updates (Jessica):**

- **MIP Welcome Social Event:** Jessica reported ~202 RSVPs, with an expected final attendance of 230–250 families.
- **Program Intro:** Jessica suggested having Ken speak at the September 11th event to introduce the MIP program and educate incoming families.
- **Event Photography:** Rosa, a kindergarten parent, will take photos during the Welcome Social for the upcoming newsletter recap.

- **Communications Updates (Cindy):**

- **Student Features:** Upcoming issues will spotlight middle and high school students in the MIP program.
- **Club Highlights:** Will feature the Little Language Learners Club, which offers free language support for students in 3rd grade and below.
- **Promotions:** Will promote Jennifer Hewitt's tutoring services at Bergeson Elementary.
- **Next Issue:** Scheduled for release in mid-October, featuring updates on the Annual Giving fundraiser positioning.

- **Middle School Liaison Updates (Vanna):**

- **Annual Fundraising:** Information about the Annual Gift has been shared with new parents via teachers, take-home pamphlets, canvas announcements, the Welcome Back Social, and the newsletter. Principal Bajorek requested keeping the FoMIP fundraising low-profile for now so it doesn't conflict with Newhart's major annual school fundraiser occurring over the next few weeks. Last year, the class with the highest donation rate received a ramen party. The possibility of holding a similar incentive this year is TBD pending Principal Bajorek's approval.
- **Level Learning Expansion:** Adding ~131–134 Newhart middle school students to the Level Learning program reduced the cost per student for Bergeson from \$63 down to \$42. The plan is to negotiate combining the Bergeson and Newhart teacher training into one joint session to save \$2,000. Due to previous students' positive feedback on level learning, Bergeson and Newhart will fully adopt level learning and move forward with full implementation of the program.



- **Community Liaison Updates (Jullian):**
 - **PLC Extension and Professional Development:** 4th and 5th-grade teachers (including combo) requested 7 PLC days instead of 5. New teachers also requested training on grading and report card writing as well as shadowing veteran teachers for guidance on classroom management and curriculum planning to ensure consistency.
- **Next Board Meeting:**
 - The next board meeting is currently scheduled for October 1, 2026

Follow-up Tasks

- Ken: Remove interdistrict recruitment language from website/materials immediately
- Ken: Share drafted letter regarding the future of Bergeson program with the MIP board for review
- Ken: Attend September Principals' meeting/coffee chat to gather data regarding the future of current MIP interdistrict transfer students
- Ken: Reach out to high school representative (Ms. Komine) & connect with Cindy for newsletter coverage
- Ken: Develop a template letter to advocate for interdistrict transfer families
- Dr. Kim: Request written confirmation from district on interdistrict transfer continuation through grade 12
- Dr. Kim: Post job opening for second 3-hour aide position immediately
- Jennifer: Develop fundraising promotional materials
- Julianne: Follow up with Miss Chang on 3-hour aide distribution among 4th and 5th-grade teachers
- Julianne: Confirm specific PLC day requests from new teachers at Bergeson
- Cindy: Connect with Laguna Niguel councilwoman Stephanie Oddo on ways to support MIP
- Cindy: Work with Jennifer on positioning annual giving fundraiser in newsletter
- Vanna: Verify Bergeson's Level Learning numbers and forward invoices to the board
- Vanna: Provide fundraising thermometer to Bergeson
- Ghazaleh: Check inventory and place hoodie orders for December bake sale