

## House Public Education Thursday, April 16, 2009

The House Public Education Committee convened on Tuesday, April 14, 2009 to discuss several bills including two major finance bills, **HB 1555**, filed by **Rep. Patrick**, and **HB 3646**, filed by **Rep. Hochberg**. Both bill elicited testimony from several school districts that have been negatively impacted by the current target revenue system and were supportive of moving back into a formula system.

Lynn Moak offered testimony on both bills, on behalf of the Texas School Alliance and was supportive of a move back towards a formula system. Dan Casey also gave testimony on both bills, on behalf of Moak, Casey and Associates along with providing substantial, written recommendations to Rep. Hochberg to strengthen the legislation. Mr. Casey paid particular attention to the bill's use of current year values and recommended that that a move from previous year values may negatively impact some districts. Martin Pena was also present and registered in favor of both bills. Mr. Pena also offered supportive, oral testimony on HB 1512, filed by Rep. Herrero. Amanda Brownson spoke in favor of Rep. Herrero's bill on behalf of TSA.

Attorney General opinion on the Permanent School Fund – David Anderson (TEA) told the committee that that an appropriation from the ASF in the first year of the biennium is unlikely and that a distribution in the second year is likely to be smaller than the amount contemplated in the appropriations bill, if there is one at all.

**HB 1512 Herrero** Relating to use of weighted average daily attendance in computing the high school allotment under the Foundation School Program.

**Remarks:** Calculates the high school allotment by the following: the amount of students per WADA in grades 9-12 as determined by dividing the sum of the district's allotments for students in grades nine through 12 under Subchapter B and Sections 42.151-42.154, 42.156, and 42.157 by the basic allotment.

**Testimony: Rep. Olivo** introduced this bill on behalf of **Rep. Herrero**. **Amanda Brownson,** TSA, testified for the bill, indicating that the modifications would allow for the high school allotment to go out to school districts on a cost-adjusted basis, sending more revenue to districts facing higher costs. **Martin Pena,** STAS, testified for the bill. He described the larger challenges and higher costs associated with service populations of students that are from low-income families or that are learning English. He noted that the bill would cost-adjust the high school allotment to account for some of these costs. Rep. Hochberg stated that this is particularly notable, given that districts that face these high costs tend to have higher dropout rates and so are disadvantaged by an allotment for students in grades 9 through 12. Mr. Pena agreed.

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Witnesses not wishing to testify but registered in favor of the bill included Luis Figueroa, an attorney with MALDEF, Wayne Pierce with the Equity Center, and Bill Grusendorf with the Texas Association of Rural Schools.

The bill was left pending.

**HB 1555 Patrick, Diane** Relating to public school finance.

Remarks: Please find more details at www.moakcasey.com

Testimony: Wayne Pierce (Equity Center) provided invited testimony and answered questions from members. Representative Aycock asked what would keep us from being able to fully fund this bill. Mr. Pierce responded that the biggest problem we would have is with the commitment to putting money into the system at a level of up to three percent per year. Every two years the legislature would set the yield for the next biennium, and if there is no money, then they could adjust it but with a positive action, so this can be adjusted year to year to meet financial realities. Representative Jackson asked for him to clarify whether all districts will in fact receive more money. Mr. Pierce responded that all districts will receive more per WADA than the previous year with the exception of districts whose tax rate of the year in question was below one dollar. Representative Hochberg noted that his cost estimate from the LBB was for \$1.9 billion for the first year of the biennium and \$3 billion for the second year which is over the budget by \$3 billion. Mr. Pierce responded that his estimates produced lower costs than those provided by the Legislative Budget Board.

**Duncan Klussmann (TSA)** testified for the bill stating that while planning for the future, we cannot forget the situation we are in currently. He noted that because of frozen target revenue, there are not adjustments for inflation. He also noted that the effects of local property value growth are going toward the state and not helping local districts. Dr. Klussmann testified that this bill makes improvements in equity, while the current system institutionalizes inequity. He also pointed out that the \$1.9 billion over 2 years comes out to \$200 per student for the biennium and noted that this is not a sufficient increase to solve the current school finance problems.

Bill Grusendorf (Texas Association of Rural Schools) testified for the bill stating that he had a list of over 500 names from the districts he represents that support the bill and not one has voiced that they are against this legislation. Paul Colbert (El Paso ISD) testified in support of bill stating that we have an irrational (inefficient) and inadequate system. He noted that school finance problems arise because of a continuing shift from state to local funding. He testified in favor of a linkage between the basic allotment, guaranteed yield and recapture in order to maintain an equitable system.

**Brock Gregg (ATPE)** testified that they like that this bill drives more dollars to schools and his sentiments were echoed by other teacher groups. **Ted Molina Rabb**, with **TX-AFT** and **Lonnie Hollingsworth** with **TCTA** both supported the bill on the basis that without this legislation, school districts have no mechanism to raise funds and meet inflationary costs. **Portia Bosse** also testified on behalf of **TSTA**.

Lynn Moak, testifying on behalf of TSA, presented the Cost Analysis for Texas Public Schools, a report that lays out a basis for where we stand on adequacy, equity and capacity and analyzes district expenditures. He noted that the bill will be an improvement from where we are today. He pointed out that national measures of equity applied to Texas revenue data have decreased over a 5 year period. Mr. Moak also testified that, although there is more capacity in the system currently than prior to West Orange-Cove, it has

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declined in recent years. He stated that the data suggest a need for significant improvement in adequacy, whether measured against the national level or within the state between districts. He complemented the author for adding a study of the weights and adjustments into the committee substitute. He suggested the basic allotment must be set at a level sufficient to provide for an adequate level of education as measured against the aspirations of our state.

Numerous district superintendents testified on behalf of the bill, sharing their districts' budget stories. **Dee Carter Superintendent** of **Navarro ISD** testified for the bill and described the situation in her district stating that they are the "poster child" of a district that was captured at a very tough time when their values were down. Currently, even if they go to a \$1.17, they will still raise less revenue than the state average.

**Dr. Louis Stoerner**, Superintended of **Alief ISD (Equity Center)** testified that it has been difficult to explain to his community why their target revenue is lower than their neighbors. This sparked a conversation between him and **Representative Hochberg** as to what specifically occurs in the system that leads to these situations of inequitable target revenues. **Dr. Leslie James** spoke on behalf of **Forth Worth ISD** in support of the bill. Dr. James explained that the current target revenue system has required the district to make staff cutbacks.

Catherine Clark (TASB) testified for the bill. She pointed out that equity is eroding and districts are digging into their fund balances. She said that this system will not hold much longer and said that we must have a system that flows money in a fair way. David Thompson with TASA echoed the statements made by TX-AFT and TCTA. He noted that while it is beneficial to associate yield to a certain school district, it is important to consider Lynn Moak's comments about the need to re-examine which district's yield this is based upon. Luis Figueroa, an attorney with MALDEF, also supported the bill and used the West Orange-Cove decision as an example of the importance of assuring equity as long as the state relies on property taxes to fund public schools.

Dan Casey provided testimony on behalf of himself and Moak, Casey and Associates which addressed the inequities of the current target revenue system, the variance in property valuations, and the snapshot concept which freezes districts into a single year. Mr. Casey also discussed the problematic nature of not having a correction mechanism embedded in the current system. Rep. Hochberg acknowledged his understanding that although inequities have always existed, these inequities were less apparent prior to the target revenue system. He also noted that the target revenue system froze inequities at levels that existed in a particular year, and so the system was not allowed to recalibrate in a subsequent year.

Martín Peña registered in favor of the bill on behalf of the South Texas Association of Schools.

Representative Patrick thanked everyone for testifying. She also urged members to listen to their constituents and she offered to work with those who testified and with other members to create a school finance bill that will help the students of Texas.

This bill was left pending.

**HB 2364 Eissler** Relating to an exception to the wealth per student limitation for certain school districts.

**Remarks:** A school district is not required to satisfy any wealth per student limitation under Chapter 41 and is not required to take any action under Chapter 41 to achieve the equalized wealth level if the district is located at least partially in a county with a population of 1.5 million or more and: (1) 20 percent or more of the students in prekindergarten through fifth grade in the district are classified as students of limited English

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proficiency;(2)50 percent or more of the total students in the district are economically disadvantaged and have family incomes below the federal poverty level; (3) 65 percent or more of the students in prekindergarten through fifth grade in the district are economically disadvantaged, as determined by the commissioner; (4) the district has a student mobility rate of 25 percent or higher, as determined by the commissioner; and (5) 75 percent or more of the total students in the district are minority students, as determined by the commissioner.

A school district that establishes eligibility for the exception is entitled to the exception for a period of four consecutive school years. After that period, the district remains eligible for the exception until the student population of the district results in district percentages regarding at least two of the criteria that are more than five percentage points below the percentages. The commissioner shall adopt rules as necessary to administer.

**Testimony: Dr. H.D. Chambers,** superintendent of **Stafford ISD** testified that their district, though property wealthy, serves a significant number of students who are low income. **Representative Hochberg** thought that some of these populations were already accounted for in WADA. Dr. Chambers responded that the system is not taking them into account to the appropriate degree. Mayor of Stafford, **Leonard Scarcella** also testified for the bill, pointing out that some if the students facing the largest challenges are in metropolitan areas.

Testifying against the bill were **Bill Grusendorf**, who noted a problem with the bill because it confuses the issue of poor students and tax payer equity, **Ken McCraw (TACS)**, **Martin Pena (STAS)** and **Wayne Pierce**.

Registered for the bill was Robbie Collins (Dallas ISD).

The bill was left pending.

**HB 2563 Paxton** Relating to determination of and notification regarding the state compression percentage under the public school finance system and the elimination of property taxes for school district maintenance and operations.

**Remarks:** Adds to the education code that the Commissioner of Education, in consultation with the LBB shall determine the state compression percentage of a school districts M&O tax rate.

For the state fiscal year ending August 31, 2009, the state compression percentage is 66.67 percent. For each subsequent state fiscal year, the state compression percentage is the lesser of: the percentage determined by the Commissioner in consultation with the LBB; or the state compression percentage for the preceding state fiscal year. Not later than March 1 of each year, the commissioner shall: inform school districts of the state compression percentage for the following school year; and post the state compression percentage for the following school year on the agency's website.

The governing board of an independent school district, including the city council or commission that has jurisdiction over a municipally controlled independent school district, the governing board of a rural high school district, and the commissioners court of a county, on behalf of each common school district under its jurisdiction, may, during the five-year period beginning with the year in which the state compression percentage is zero, impose an annual ad valorem tax for the maintenance of public schools at a rate not to

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exceed \$0.17. After that period, annual ad valorem taxes for the maintenance of public schools may not be levied, assessed, or collected.

**Testimony: Rep. Paxton** laid out the background and scope of the bill. **Rep. Hochberg** questioned how this bill would differ from current statute to which Rep. Paxton explained that this bill would stop compression rates from raising.

**Ken McGraw**, with the **Texas Association of Community Schools**, opposed further compression of taxes and therefore opposed the bill. **David Thompson**, on behalf of **TSA**, **TASA**, and **TASB**, also spoke in opposition to the bill stating that the compression of a tax rate leading to 0 percent is bad public policy. **Ted Molina Raab**, with **Texas – AFT**, echoed the previous statements and opposed the bill due to its lack of guarantee of revenue for current and future needs. Mr. Raab also stated that TX-AFT cannot support further compression of the tax rate.

Martín Peña was present to register against this bill on behalf of STAS.

The bill was left pending.

**HB 3697 Aycock** Relating to the issuance of certain tax-supported bonds.

**Remarks:** A district may demonstrate the ability to pay the principal and interest on a proposed bond and all previously issued bonds by using pro forma debt service projections on the proposed bonds and all previously issued bonds based on current market interest rates and yields, as determined by the district and certified by a financial advisor or consultant to the district. For the purposes of determining pro forma debt service on the proposed bonds and all previously issued bonds, the district shall amortize the proposed bonds and the previously issued bonds over the maximum term for such bonds permitted by law.

A district that demonstrates this ability may issue the proposed bonds in any manner that will produce actual debt service savings of at least 10 percent, as determined by the district, when compared to the pro forma debt service payments on the proposed bonds used to demonstrate that the district has the projected ability to comply. Actual debt service savings shall be determined using the difference between the total amount of the pro forma debt service payments on the proposed bonds, as a percentage of the total amount of the pro forma debt service payments on the proposed bonds.

Testimony: Dr. Ray Braswell Superintendent of Denton ISD (Fast Growth Schools Coalition) testified for the bill stating that they do not want to over leverage the tax payers. Dr. Don Stockton, Superintendent of Conroe ISD also testified for the bill and expressed his concerns with long term debt and discussed how his district has managed this. Mike Jolly (BOC Inc.) said that this bill allows for better business practices for school districts so they can better manage their bonds. David Thompson (TASA) noted that the bill has no cost to the state and has the potential to save millions of dollars. Catherine Clark (TASB) also pointed out that this bill provides relief without extra funding and allows savings for tax payers while providing checks and controls. Karen Rue Superintendent of Northwest ISD (Fast Growth Schools Coalition) testified that many districts see the looming tax burden, and this bill provides a way to mange debt and provide for students.

Registered for the bill were Martin Pena (STAS), Dan Casey (Moak, Casey and Associates), and Bill Grusendorf (Texas Association of Rural Schools).

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The bill was left pending.

HB 3646 Hochberg Relating to public school finance.

Remarks: This bill is likely to change as it moves through the process. Provides for an unspecified salary increase for teachers, librarians, counselors, nurses and speech pathologists. Provides for new special education grant program. Moves to current year property values in determination of state aid. Extends the flexible day program below grade 9 and to students will be denied credit due to attendance requirements. Removes set asides for financing testing program. Creates new basic allotment to be based on specified state share of funding and ties it to district compressed tax rates(from \$0.86). Moves high school allotment into chapter 42 as a Tier I allotment. Sets state compression percentage in chapter 42. Ties hold-harmless to 2008-09 revenue. May remove recapture exemption on six pennies above compressed rate. Increases yield on every districts' last six cents of tax effort to Austin ISD yield. Repeals several old-law hold harmless provisions.

**Testimony:** Rep. Hochberg introduced a committee substitute. He offered a substantial explanation of the flaws in the current system and the ways in which the bill seeks to resolve school finance issues within the confines of available funding. He described problems associated with the practice of using set-asides from the foundation school program to pay for specific programs such as the state testing program, issues associated with the use of prior year funding values, and issues associated with the target revenue system.

The first testimony heard was given by **Mark Williams**, school board president for **Austin ISD**, who registered neutrally on the bill. Mr. Williams expressed concern with lack of attention to social security issues affecting some districts, and the specific challenges social security payments cause for Austin ISD. **Wayne Pierce** also offered neutral testimony on behalf of the **Equity Center**. He commended Rep. Hochberg for taking steps toward adopting a uniform definition for WADA, the bill's stabilization of the state compression ratio, and creation of a uniform yield. However, Mr. Pierce expressed concern that the bill does not create a dynamic system that improves revenue as property values grow since it leaves the decision of the state share of public education funding to the appropriations process. **Rep. Hochberg** asked Mr. Pierce what would happen if there were a driver in the system that increased cost and the state were to have an economic downturn. Mr. Pierce said that the legislature would then need to pass a statute to lower the funding level. Mr. Hochberg asked what the state should do if property values were to increase by 25 percent in a given year. Mr. Pierce said that districts could be required to reduce their tax rates if they were to get significant additional revenue.

**Ted Molina Raab** offered testimony on behalf of **TX - AFT**, in support of the bill. He explained the importance of school finance reform, particularly if it allows for a teacher pay raise. This testimony was followed by **David Thompson**, on behalf of **TASA**, in support of the bill. He echoed Mr. Raab's statements about the positive changes this reform would bring about. However, he was concerned that this bill would not put in place a mechanism to ensure there will be no corrosion in a district's purchasing power. He asked Mr. Hochberg to put a mechanism in place to keep the system from losing value over time as inflationary costs and costs associated with increased educational expectations from the state consume districts' access to discretionary revenue. **Mr. Hochberg** pointed out that costs could increase even in a year in which property values declined.

**Bill Grusendorf** also spoke neutrally on the bill, on behalf of **TARS**. He emphasized the need to include a driver in the finance system, otherwise effective reform will not occur. He went on to suggest that all

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penalties be removed from the school finance system. **Lonnie Hollingsworth** spoke next and offered supportive testimony for the bill on behalf of **TCTA**. Mr. Hollingsworth noted the driver issue but stated that he feels it is more of a tax policy issue and not something to be determined in a school finance bill. **Brock Gregg**, with **ATPE**, also gave supportive testimony for the bill and stressed the need to pass this bill in order to provide teacher pay raises. **Dwayne York**, Superintendent of **Wimberly ISD**, offered testimony in support of the bill especially due to the equity issues and mid-sized school adjustments this bill seeks to address, along with teacher salaries.

Lynn Moak, on behalf of MCA and TSA, testified for the bill and offered several suggestions to strengthen the legislation. He pointed out that there were a significant number of districts that had recently adopted deficit budgets and if too significant a portion of the additional revenue in the bill were tied to mandatory salary increases, districts would not have the opportunity to close budget gaps. Mr. Moak also pointed out that the state had an automatic budget driver for many sessions when it routinely increased the basic allotment and guaranteed yield to maintain a system in which 85 percent of the students were in an equalized system. He suggested the legislature set a percentage local share in statute in order to maintain such a driver in the system. The weights and adjustments in current law remain badly in need of attention and he also pointed to the need to move the funding system in parallel with the accountability system.

**Ken McCraw**, with the **Texas Association of Community Schools**, provided neutral testimony on the bill and expressed concern that the bill's teacher pay increase might cause districts to tap into their general fund balances in order to meet this mandate.

**Dr. Duncan Klussman**, Superintendent of Spring Branch ISD and on behalf of **TSA**, offered supportive testimony for the bill. Dr. Klussman discussed the problematic nature for districts when local taxpayers pay locally established taxes but find out the dollars are not necessarily used locally. This can make local tax levies on behalf of school districts difficult to pass in communities. He went on to state the importance of establishing a stable finance system to allow districts the development of more accurate, long-term budget plans.

Catherine Clark, for TASB, also offered testimony in support of the bill and was particularly supportive of the flexibility the bill would allow for districts to cover social security and TRS payments. Paul Colbert, on behalf of El Paso ISD, spoke next with neutral testimony on the bill. He noted the lack of a driver in this bill and explained the importance of including this element to strengthen the proposed legislation. He said that the rainy day fund should be used when the state does not have sufficient revenue to cover cost increases.

Dan Casey testified on behalf of Moak, Casey & Associates for the bill and expressed concern about the impact of using current values on Ch. 41 districts whose wealth notifications of prior year value to trigger elections. Mr. Casey explained that it is not clear how the use of current year values would affect elections, along with EDA and IFA allotments. He went on to explain that moving to current year values may reduce state aid and increase taxes for these districts under the proposed scenario. Rep. Eissler noted the importance of this point and Rep. Hochberg explained that Moak, Casey and Associates has submitted to his office a substantial document with these suggestions included.

**Steve West**, CFO for **Austin ISD**, spoke on the bill but stated the importance of returning to a formula driven system. His brief testimony closed with an acknowledgement that this bill represents a step in that

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direction. Final testimony was heard from **Portia Bosse** on behalf of TSTA. She echoed her previous, supportive statements made for HB 1555, especially because this bill aims to provide a teacher pay raise.

Martin Pena was present to register for the bill on behalf of STAS.

The bill was left pending.

HB 3740 Hochberg Relating to a statewide education data management system.

Remarks: Creates a joint governance structure to oversee data collection and data standards that includes TEA and the Higher Education Coordinating Board as well as representatives from public and charter schools, education service centers, institutions of higher education, and university systems. Requires TEA to develop a new information management system. Requires TEA and the Higher Education Coordinating Board to jointly maintain an operational data store and to periodically extract data from public and higher education. Prohibits the agency from using the operational data to for their own analyses.

**Testimony: Catherine Clark (TASB)** testified for the bill stating that the system has not grown appropriately and is out of date. **Ted Molina Raab** noted that some changes need to be made to the bill language. **Andrew Urban (TAB)** testified on the bill noting that data must be organized and managed all the way down to the campus level. They want a dropout tracking system that works in real time and tracks students statewide. He also testified that they would like more raw data to be available.

Registered for the bill were Amy Beneski (TASA), and various teacher associations.

The bill was left pending.

**HB 2893 Hochberg** Relating to the technology demonstration sites project.

**Remarks:** Changes the "technology immersion pilot project" to the "technology demonstration sites project." TEA may by rule establish the technology demonstration sites project to demonstrate the use of technology for improving teaching and learning, leverage digital tools and resources to extend learning opportunities from school to home, and exemplify instructional practices and lessons that support academic learning in the classroom and at home.

The demonstration site project shall leverage existing home computing devices or provide access through electronic device check-out options to extend learning at home. Electronic devices shall be made available to each student in a participating school to allow students at school and home to implement the use of software, on-line courses, and other appropriate learning technologies that have been shown to improve academic achievement.

Testimony: Registered for the bill were various teacher organizations, and Amy Beneski (TASA).

The bill was left pending.

**HB 813 Swinford** Relating to eligibility for the small and mid-sized adjustment under the public school finance system.

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**Remarks:** Allows for the small and mid-size adjustment to be applied to Chapter 41 schools.

Testimony: Both Love Joy ISD and Stafford ISD testified for the bill. Also registered for the bill were Martin Pena (STAS), Dominic Giarratani (TASB), Amy Beneski (TASA), and Bill Grusendorf (TARS).

The bill was left pending.

## The following bills were passed out of committee

**HB 626** Allen Relating to an educational involvement agreement setting forth the respective responsibilities of students, parents, teachers, and principals in public schools.

Remarks: The agency shall adopt an educational involvement agreement form for use by school districts to be signed by a student, the student's parent, each of the student's teachers, and the principal of the student's school. The agreement must state the respective responsibilities of the student, parent, teacher, and principal. A school district shall provide the agreement to each individual who is required to sign the agreement not later than the 14th day after the first day of instruction for a school year or the 14th day after the date a student enrolls in the school, as applicable. A school district must provide a parent with a reasonable opportunity to sign the agreement.

**HB 1263 Villarreal** Relating to the exemption of certain public school students of limited English proficiency from certain state-administered assessment instruments.

**Remarks:** Extends the period of time a student of limited English proficiency has in which they can be exempt from the a state assessment instrument if they have not demonstrated proficiency in English.

**HB 1364 Eissler** Relating to coverage of preexisting conditions by certain group health benefit coverage programs for active school employees.

Remarks: As filed: Adds to the state's insurance program, language that utilizes the Insurance Code's definitions for pre-existing conditions.

**HB 2823 Patrick, Diane** Relating to eligible recipients of certain grants awarded by the commissioner of education.

**Remarks:** The commissioner cannot award a grant to an organization to provide a comprehensive educational program to students that serves as a substitute for a regular educational program provided by a school district or open-enrollment charter school.

To meet the goals of the High School Completion and Success Initiative Council the commissioner of education of higher education may award grants to school districts, open-enrollment charter schools, institutions of higher education, regional education service centers, and nonprofit organizations that provide technical assistance, professional development, case-managed student services, and programs for the benefit of students enrolled in school districts or open-enrollment charter schools.

The commissioner may not award a grant to a nonprofit organization for services provided as a private school or to a private school.

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**HB 4152 Rose** Relating to certification of an educator in Texas who is certified in another state or country.

**Remarks:** The board shall (not may) issue a certificate to an educator who applies for a certificate and hold a certificate or credential issues by another state or country to teach math, science, special education, or any other subject area the commissioner determines has a shortage area.

**HB 4294 Branch** Relating to instructional materials and technological equipment in public schools.

**Remarks:** Adds instructional materials and electronic textbooks to the materials selected by the SBOE for the foundation curriculum and enrichment curriculum.

A school district or open-enrollment charter school that selects a textbook that is not on the conforming or nonconforming list is responsible for the portion of the cost of the textbook that is not paid by the state and the state shall pay to the district or school 100 percent of the limitation for materials for each subject and grade level, multiplied by the number of instructional materials and electronic textbooks the district or school needs for each subject and grade level.

The commissioner shall adopt a list of instructional materials and electronic textbooks that may be purchased by a school district and funded in the manner explained above. The commissioner shall adopt minimum criteria that instructional materials and electronic textbooks must meet to be included on the list adopted by the commissioner. Funds received from the state by school districts and open enrollment charter schools under this section may also be used to provide for the purchase by school districts of technological equipment needed to provide access to SBOE-approved textbooks.

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