

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

2008

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

The organization may have to use a copy of this return to satisfy state reporting requirements.

A For the 2008 calendar year, or tax year beginning JUL 1, 2008 and ending JUN 30, 2009

B Check if applicable: <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Termination <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	C Name of organization CALIFORNIA SCHOOL BOARDS ASSOCIATION Doing Business As	D Employer identification number 94-1510492
	Number and street (or P.O. box if mail is not delivered to street address) Room/suite PO BOX 1660	E Telephone number 916-371-4691
	City or town, state or country, and ZIP + 4 WEST SACRAMENTO, CA 95691	G Gross receipts \$ 12,843,859.
	F Name and address of principal officer: SCOTT P PLOTKIN SAME AS C ABOVE	H(a) Is this a group return for affiliates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No H(b) Are all affiliates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If "No," attach a list. (see instructions) H(c) Group exemption number
I Tax-exempt status: <input checked="" type="checkbox"/> 501(c) (4) ◀ (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		
J Website: ▶ WWW.CSBA.ORG		
K Type of organization: <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		
L Year of formation: 1952		M State of legal domicile: CA

Part I Summary

Activities & Governance	1	Briefly describe the organization's mission or most significant activities: PROMOTING PUBLIC EDUCATION		
	2	Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its assets.		
	3	Number of voting members of the governing body (Part VI, line 1a)	3	32
	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	28
	5	Total number of employees (Part V, line 2a)	5	197
	6	Total number of volunteers (estimate if necessary)	6	0
	7a	Total gross unrelated business revenue from Part VIII, line 12, column (C)	7a	114,105.
7b	Net unrelated business taxable income from Form 990-T, line 34	7b	<26,170.>	
Revenue	8	Contributions and grants (Part VIII, line 1h)	Prior Year 11,525.	Current Year 149,041.
	9	Program service revenue (Part VIII, line 2g)	12,664,138.	12,437,574.
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	313,595.	147,674.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	131,858.	109,570.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	13,121,116.	12,843,859.
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1-3)		764,083.
	14	Benefits paid to or for members (Part IX, column (A), line 4)		
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	7,738,651.	7,942,741.
	16a	Professional fundraising fees (Part IX, column (A), line 11e)		
	16b	Total fundraising expenses (Part IX, column (D), line 25)		
	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	4,641,052.	4,616,658.
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	12,379,703.	13,323,482.
19	Revenue less expenses. Subtract line 18 from line 12	741,413.	<479,623.>	
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	Beginning of Year 13,421,565.	End of Year 9,493,249.
	21	Total liabilities (Part X, line 26)	8,932,204.	5,483,511.
	22	Net assets or fund balances. Subtract line 21 from line 20	4,489,361.	4,009,738.

Part II Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer _____ Date _____

Type or print name and title _____

Paid Preparer's Use Only	Preparer's signature	<i>Linda D. Leary, CPA</i>	Date	3/11/10	Check if self-employed	<input type="checkbox"/>	Preparer's identifying number (see instructions)	P00364484
	Firm's name (or yours if self-employed), address, and ZIP + 4	GILBERT ASSOCIATES INC. 2880 GATEWAY OAKS DR, STE 100 SACRAMENTO, CA 95833		EIN	▶ 68-0037990		Phone no.	▶ 916-646-6464

May the IRS discuss this return with the preparer shown above? (see instructions) Yes No

Part III Statement of Program Service Accomplishments (see instructions)

1 Briefly describe the organization's mission: SEE SCHEDULE O FOR CONTINUATION
BOARDS OF EDUCATION ARE ENTRUSTED BY THEIR DIVERSE COMMUNITIES TO ENSURE THAT A HIGH QUALITY EDUCATION IS PROVIDED TO EACH STUDENT. CSBA PROMOTES SUCCESS FOR ALL STUDENTS BY DEFINING AND DRIVING THE PUBLIC EDUCATION AGENDA AND STRENGTHENING SCHOOL BOARD GOVERNANCE AT THE

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? [] Yes [X] No
If "Yes", describe these new services on Schedule O.

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? [] Yes [X] No
If "Yes", describe these changes on Schedule O.

4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

SEE SCHEDULE O FOR CONTINUATION(S)

4a (Code:) (Expenses \$ 3,306,417. including grants of \$ 764,083.) (Revenue \$ 3,136,975.)
POLICY SERVICES PROVIDES SUPPORT SERVICES TO SCHOOL BOARDS AND ADMINISTRATORS TO HELP THEM IN THE DEVELOPMENT AND MAINTENANCE OF LOCAL POLICIES.

THE POLICY UPDATE SERVICE HELPS SAVE SCHOOL DISTRICTS AND COUNTY OFFICES OF EDUCATION TIME AND MONEY WITH AN EASY-TO-USE, LEGALLY-REFERENCED, THREE-VOLUME SAMPLE POLICY MANUAL.

GAMUT ONLINE PROVIDES EASY ACCESS TO CSBA SAMPLE POLICIES, REGULATIONS AND BYLAWS, PERTINENT LAWS AND OTHER RESOURCES. GAMUT ONLINE IS UPDATED CONTINUOUSLY.

4b (Code:) (Expenses \$ 1,803,683. including grants of \$) (Revenue \$ 1,266,747.)
THE EDUCATION LEGAL ALLIANCE (ELA) TAKES ON ISSUES OF STATEWIDE IMPACT ON BEHALF OF ITS MEMBERS, SUPPORTS MEMBERS IN LEGAL CHALLENGES AND TRACKS CASE LAW PERTINENT TO EDUCATION IN CALIFORNIA. IT FILES NUMEROUS AMICUS BRIEFS THAT SUPPORT SCHOOL DISTRICTS ON MATTERS OF STATEWIDE IMPORTANCE. DISTRICTS AND COUNTY OFFICES OF EDUCATION, ON A VOLUNTARY BASIS, CONTRIBUTE ANNUALLY TO A FUND THAT IS RESTRICTED FOR LEGAL ACTIVITY. AN ADVISORY COMMITTEE OF NOTED SCHOOL LAW ATTORNEYS REVIEWS CASES AND LEGAL ISSUES RAISED BY ALLIANCE MEMBERS AND ADVISES A STEERING COMMITTEE ON THE POTENTIAL STATEWIDE IMPACT OF THE CASE AS WELL AS THE LIKELIHOOD OF SUCCESS IN THE COURTS. THE STEERING COMMITTEE, COMPRISED OF PROMINENT BOARD MEMBERS, SUPERINTENDENTS, AND EDUCATION EXPERTS, MAKES THE FINAL DECISION ABOUT FUNDING VARIOUS LEGAL

4c (Code:) (Expenses \$ 1,697,503. including grants of \$) (Revenue \$ 6,079,278.)
THE COMMUNICATIONS DEPARTMENT HELPS CSBA MEMBERS, THE PUBLIC AND MEDIA UNDERSTAND THE ROLE OF SCHOOL BOARDS AND THE IMPORTANCE OF LOCAL SCHOOL GOVERNANCE THROUGH PUBLICATIONS, NEWS ADVISORIES AND RELEASES, COLLATERAL MATERIAL, THE CSBA WEB SITE, WEEKLY E-NEWS BLASTS, MONTHLY CALIFORNIA SCHOOL NEWS NEWSLETTER, QUARTERLY CALIFORNIA SCHOOLS MAGAZINE, AND MORE RECENTLY, THROUGH SOCIAL MEDIA OUTLETS SUCH AS YOU TUBE. THE DEPARTMENT ALSO FIELDS MEDIA INQUIRIES AND OTHER PUBLIC QUESTIONS. WE REACH OUT TO MORE THAN 5,000 SCHOOL BOARD MEMBERS AND NEARLY 1,000 SUPERINTENDENTS IN OUR NEARLY 1,000 MEMBER SCHOOL DISTRICTS, COUNTY OFFICES OF EDUCATION AND REGIONAL OCCUPATIONAL CENTERS/PROGRAMS.

4d Other program services. (Describe in Schedule O.)
(Expenses \$ 3,890,813. including grants of \$) (Revenue \$ 2,360,859.)

4e Total program service expenses \$ 10,698,416. (Must equal Part IX, Line 25, column (B).)

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A</i>		X
2 Is the organization required to complete Schedule B, Schedule of Contributors?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I</i>		X
4 Section 501(c)(3) organizations. Did the organization engage in lobbying activities? <i>If "Yes," complete Schedule C, Part II</i>		
5 Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? <i>If "Yes," complete Schedule C, Part III</i>	X	
6 Did the organization maintain any donor advised funds or any accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I</i>		X
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? <i>If "Yes," complete Schedule D, Part II</i>		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III</i>		X
9 Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV</i>		X
10 Did the organization hold assets in term, permanent, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V</i>		X
11 Did the organization report an amount in Part X, lines 10, 12, 13, 15, or 25? <i>If "Yes," complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable</i>	X	
12 Did the organization receive an audited financial statement for the year for which it is completing this return that was prepared in accordance with GAAP? <i>If "Yes," complete Schedule D, Parts XI, XII, and XIII</i>		X
13 Is the organization a school as described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E</i>		X
14a Did the organization maintain an office, employees, or agents outside of the U.S.?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the U.S.? <i>If "Yes," complete Schedule F, Part I</i>		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? <i>If "Yes," complete Schedule F, Part II</i>		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? <i>If "Yes," complete Schedule F, Part III</i>		X
17 Did the organization report more than \$15,000 on Part IX, column (A), line 11e? <i>If "Yes," complete Schedule G, Part I</i>		X
18 Did the organization report more than \$15,000 total on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II</i>		X
19 Did the organization report more than \$15,000 on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III</i>		X
20 Did the organization operate one or more hospitals? <i>If "Yes," complete Schedule H</i>		X
21 Did the organization report more than \$5,000 on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	X	
22 Did the organization report more than \$5,000 on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>		X
23 Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5? <i>If "Yes," complete Schedule J</i>	X	
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer questions 24b-24d and complete Schedule K. If "No," go to question 25</i>		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
25a Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>		X
b Did the organization become aware that it had engaged in an excess benefit transaction with a disqualified person from a prior year? <i>If "Yes," complete Schedule L, Part I</i>		X
26 Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i>		X
27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, or substantial contributor, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i>		X

Part IV Checklist of Required Schedules (continued)

		Yes	No
28	During the tax year, did any person who is a current or former officer, director, trustee, or key employee:		
a	Have a direct business relationship with the organization (other than as an officer, director, trustee, or employee), or an indirect business relationship through ownership of more than 35% in another entity (individually or collectively with other person(s) listed in Part VII, Section A)? <i>If "Yes," complete Schedule L, Part IV</i>		X
b	Have a family member who had a direct or indirect business relationship with the organization? <i>If "Yes," complete Schedule L, Part IV</i>		X
c	Serve as an officer, director, trustee, key employee, partner, or member of an entity (or a shareholder of a professional corporation) doing business with the organization? <i>If "Yes," complete Schedule L, Part IV</i>		X
29	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>		X
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		X
31	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		X
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		X
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		X
34	Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i>	X	
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i>		X
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>		
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>		X

Form 990 (2008)

Part V Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable		
	1a 73		
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable		
	1b 0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return		
	2a 197		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?	X	
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O	X	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
b	If "Yes," enter the name of the foreign country: _____ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c	If "Yes," to question 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
	5c		
6a	Did the organization solicit any contributions that were not tax deductible?	X	
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	X	
7	Organizations that may receive deductible contributions under section 170(c).		
a	Did the organization provide goods or services in exchange for any quid pro quo contribution of more than \$75?		X
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
	7b		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
	7c		
d	If "Yes," indicate the number of Forms 8282 filed during the year		
	7d		
e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
	7e		
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
	7f		
g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		
	7g		
h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		
	7h		
8	Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		
	8		
9	Section 501(c)(3) and other sponsoring organizations maintaining donor advised funds.		
a	Did the organization make any taxable distributions under section 4966?		
	9a		
b	Did the organization make a distribution to a donor, donor advisor, or related person?		
	9b		
10	Section 501(c)(7) organizations. Enter: N/A		
a	Initiation fees and capital contributions included on Part VIII, line 12	10a	
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	10b	
11	Section 501(c)(12) organizations. Enter: N/A		
a	Gross income from members or shareholders	11a	
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)	11b	
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year N/A	12b	

Part VI Governance, Management, and Disclosure (Sections A, B, and C request information about policies not required by the Internal Revenue Code.)

Section A. Governing Body and Management

For each "Yes" response to lines 2-7b below, and for a "No" response to lines 8 or 9b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

	Yes	No
1a Enter the number of voting members of the governing body		
1b Enter the number of voting members that are independent		
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		X
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		X
4 Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?		X
5 Did the organization become aware during the year of a material diversion of the organization's assets?		X
6 Does the organization have members or stockholders?	X	
7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	X	
7b Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	X	
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a The governing body?	X	
b Each committee with authority to act on behalf of the governing body?	X	
9a Does the organization have local chapters, branches, or affiliates?		X
b If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?		
10 Was a copy of the Form 990 provided to the organization's governing body before it was filed? All organizations must describe in Schedule O the process, if any, the organization uses to review the Form 990	X	
11 Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O		X

Section B. Policies

	Yes	No
12a Does the organization have a written conflict of interest policy? If "No," go to line 13	X	
b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?		X
c Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done		X
13 Does the organization have a written whistleblower policy?	X	
14 Does the organization have a written document retention and destruction policy?	X	
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision:		
a The organization's CEO, Executive Director, or top management official?	X	
b Other officers or key employees of the organization?		X
Describe the process in Schedule O. (see instructions)		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
b If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?		

Section C. Disclosure

- 17** List the states with which a copy of this Form 990 is required to be filed **CA**
- 18** Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.
 Own website Another's website Upon request
- 19** Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.
- 20** State the name, physical address, and telephone number of the person who possesses the books and records of the organization: **▶**
SONJA SPOWART AND DEANNA DONOGHUE - 916-371-4691
3100 BEACON BLVD, WEST SACRAMENTO, CA 95691

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed. Use Schedule J-2 if additional space is needed.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation, and **current** key employees. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

Check this box if the organization did not compensate any officer, director, trustee, or key employee.

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
PAUL H. CHATMAN PRESIDENT	5.00	X		X			29,250.	0.	0.	
PAULA S. CAMPBELL PRESIDENT-ELECT	5.00	X		X			22,688.	0.	0.	
FRANK PUGH VICE PRESIDENT	5.00	X		X			13,238.	0.	0.	
KATHLEEN E. KINLEY IMMEDIATE PAST PRESIDENT	5.00	X		X			13,238.	0.	0.	
BOB BERKOWITZ DIRECTOR REGION 1	1.00	X					0.	0.	0.	
BILL N. ENOS ED.D. DIRECTOR REGION 2	1.00	X					0.	0.	0.	
SHANA LEVINE DIRECTOR REGION 3	1.00	X					0.	0.	0.	
RICK ANDERSON DIRECTOR REGION 4	1.00	X					0.	0.	0.	
JILL WYNNS DIRECTOR REGION 5	1.00	X					0.	0.	0.	
PRISCILLA S. COX DIRECTOR REGION 6	1.00	X					0.	0.	0.	
JANICE FRIESEN DIRECTOR REGION 7	1.00	X					0.	0.	0.	
CINDY MARKS DIRECTOR REGION 8	1.00	X					0.	0.	0.	
CHRIS UNGAR DIRECTOR REGION 9	1.00	X					0.	0.	0.	
SUSAN MARKARIAN DIRECTOR REGION 10	1.00	X					0.	0.	0.	
JOHN WALKER DIRECTOR REGION 11	1.00	X					0.	0.	0.	
LINDA PAVLETICH DIRECTOR REGION 12	1.00	X					0.	0.	0.	
MARTHA FLUOR DIRECTOR REGION 15	1.00	X					0.	0.	0.	

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
PAT KOHLMEIER DIRECTOR REGION 16	1.00	X					0.	0.	0.	
SHARON JONES DIRECTOR REGION 17	1.00	X					0.	0.	0.	
BARBARA TOOKER DIRECTOR REGION 18	1.00	X					0.	0.	0.	
JUDY HANNEMANN DIRECTOR REGION 20	1.00	X					0.	0.	0.	
M POINDEXTER LAMOTTE DIRECTOR REGION 21	1.00	X					0.	0.	0.	
KEITH GILES DIRECTOR REGION 22	1.00	X					0.	0.	0.	
BOB J. CRUZ DIRECTOR REGION 23	1.00	X					0.	0.	0.	
SHARON STYS DIRECTOR REGION 24	1.00	X					0.	0.	0.	
JOHN W. BEDELL CA COUNTY BOARDS OF EDUC	1.00	X					0.	0.	0.	
SHELLY YARBROUGH DIRECTOR-AT-LARGE	1.00	X					0.	0.	0.	
1b Total							1,736,137.	0.	269,565.	

2 Total number of individuals (including those in 1a) who received more than \$100,000 in reportable compensation from the organization **11**

	Yes	No
3 Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual		X
4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If "Yes," complete Schedule J for such individual	X	
5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If "Yes," complete Schedule J for such person		X

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization.

(A) Name and business address	(B) Description of services	(C) Compensation
OLSON, HAGEL, 555 CAPITOL MALL, SUITE 1425, SACRAMENTO, CA 95814-4602	LEGAL	805,316.
GREENBERG TRAUERIG 12-1 K ST, STE 1100, SACRAMENTO, CA 95814	LEGAL	218,343.
FAGEN, FRIEDMAN & FULFROST, LLP, 6300 WILSHIRE BLVD, STE 1700, LOS ANGELES, CA	LEGAL	183,117.
ABHAS HAJELA 2728 EMERALD BAY DR, DAVIS, CA 95616	LEGAL	124,281.

2 Total number of independent contractors (including those in 1) who received more than \$100,000 in compensation from the organization **4**

SEE SCHEDULE J-2 FOR PART VII, SECTION A CONTINUATION

Part VIII Statement of Revenue

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
Contributions, gifts, grants and other similar amounts	1 a Federated campaigns	1a						
	b Membership dues	1b						
	c Fundraising events	1c						
	d Related organizations	1d						
	e Government grants (contributions)	1e						
	f All other contributions, gifts, grants, and similar amounts not included above	1f	149,041.					
	g Noncash contributions included in lines 1a-1f: \$		5,428.					
	h Total. Add lines 1a-1f			149,041.				
Program Service Revenue	2 a MEMBERSHIP DUES	Business Code	900099	5,923,408.	5,923,408.			
	b POLICY SERVICES		900099	3,136,975.	3,136,975.			
	c CONTINUING EDUCATION		900099	1,667,057.	1,649,717.	17,340.		
	d EDUCTN LEGAL ALLIANCE		900099	1,266,747.	1,266,747.			
	e EXECUTIVE SEARCH		900099	167,712.	167,712.			
	f All other program service revenue		900099	275,675.	178,910.	96,765.		
	g Total. Add lines 2a-2f			12437574.				
Other Revenue	3 Investment income (including dividends, interest, and other similar amounts)			147,674.			147,674.	
	4 Income from investment of tax-exempt bond proceeds							
	5 Royalties							
	6 a Gross Rents	(i) Real	(ii) Personal					
		b Less: rental expenses						
		c Rental income or (loss)						
		d Net rental income or (loss)						
	7 a Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other					
		b Less: cost or other basis and sales expenses						
		c Gain or (loss)						
		d Net gain or (loss)						
	8 a Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c). See Part IV, line 18	a						
b Less: direct expenses		b						
c Net income or (loss) from fundraising events								
9 a Gross income from gaming activities. See Part IV, line 19	a							
	b Less: direct expenses	b						
	c Net income or (loss) from gaming activities							
10 a Gross sales of inventory, less returns and allowances	a							
	b Less: cost of goods sold	b						
	c Net income or (loss) from sales of inventory							
Miscellaneous Revenue			Business Code					
11 a MISCELLANEOUS INCOME			900099	109,570.	109,570.			
	b							
	c							
	d All other revenue							
e Total. Add lines 11a-11d				109,570.				
12 Total Revenue. Add lines 1h, 2g, 3, 4, 5, 6d, 7d, 8c, 9c, 10c, and 11e				12843859.	12433039.	114,105.	147,674.	

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.
 All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.		(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21	764,083.	764,083.		
2	Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3	Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
5	Compensation of current officers, directors, trustees, and key employees	1,160,218.	682,459.	477,759.	
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7	Other salaries and wages	5,072,082.	2,983,022.	2,089,060.	
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	691,896.	409,397.	282,499.	
9	Other employee benefits	572,403.	331,738.	240,665.	
10	Payroll taxes	446,142.	263,212.	182,930.	
11	Fees for services (non-employees):				
a	Management				
b	Legal	1,219,319.	1,206,234.	13,085.	
c	Accounting	31,167.	1,200.	29,967.	
d	Lobbying				
e	Professional fundraising services. See Part IV, line 17				
f	Investment management fees				
g	Other	290,146.	150,912.	139,234.	
12	Advertising and promotion	388,447.	299,773.	88,674.	
13	Office expenses	812,238.	207,625.	604,613.	
14	Information technology				
15	Royalties				
16	Occupancy				
17	Travel	772,510.	449,731.	322,779.	
18	Payments of travel or entertainment expenses for any federal, state, or local public officials				
19	Conferences, conventions, and meetings	814,319.	646,715.	167,604.	
20	Interest				
21	Payments to affiliates				
22	Depreciation, depletion, and amortization	233,584.		233,584.	
23	Insurance	109,727.	19,349.	90,378.	
24	Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
a	MISCELLANEOUS	757,403.	258,417.	498,986.	
b	OVERHEAD APPLIED	<812,202.>	2,024,549.	<2,836,751.>	
c					
d					
e					
f	All other expenses				
25	Total functional expenses. Add lines 1 through 24f	13,323,482.	10,698,416.	2,625,066.	0.
26	Joint Costs. Check here <input type="checkbox"/> if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation ...				

Part X Balance Sheet

		(A) Beginning of year		(B) End of year	
Assets	1	Cash - non-interest-bearing	457,120.	1	394,724.
	2	Savings and temporary cash investments	6,256,030.	2	4,625,745.
	3	Pledges and grants receivable, net		3	
	4	Accounts receivable, net	136,625.	4	123,797.
	5	Receivables from current and former officers, directors, trustees, key employees, or other related parties. Complete Part II of Schedule L		5	
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L		6	
	7	Notes and loans receivable, net		7	
	8	Inventories for sale or use	37,571.	8	33,774.
	9	Prepaid expenses and deferred charges	311,688.	9	303,140.
	10a	Land, buildings, and equipment: cost basis	4,247,092.		
	b	Less: accumulated depreciation. Complete Part VI of Schedule D	2,238,650.		
			2,041,174.	10c	2,008,442.
	11	Investments - publicly traded securities		11	
	12	Investments - other securities. See Part IV, line 11		12	
	13	Investments - program-related. See Part IV, line 11		13	
	14	Intangible assets		14	
15	Other assets. See Part IV, line 11	4,181,357.	15	2,003,627.	
16	Total assets. Add lines 1 through 15 (must equal line 34)	13,421,565.	16	9,493,249.	
Liabilities	17	Accounts payable and accrued expenses	619,214.	17	418,415.
	18	Grants payable		18	
	19	Deferred revenue	2,078,006.	19	1,687,808.
	20	Tax-exempt bond liabilities		20	
	21	Escrow account liability. Complete Part IV of Schedule D		21	
	22	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23	Secured mortgages and notes payable to unrelated third parties		23	
	24	Unsecured notes and loans payable		24	
	25	Other liabilities. Complete Part X of Schedule D	6,234,984.	25	3,377,288.
	26	Total liabilities. Add lines 17 through 25	8,932,204.	26	5,483,511.
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.				
	27	Unrestricted net assets	4,489,361.	27	4,009,738.
	28	Temporarily restricted net assets		28	
	29	Permanently restricted net assets		29	
	Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.				
	30	Capital stock or trust principal, or current funds		30	
	31	Paid-in or capital surplus, or land, building, or equipment fund		31	
	32	Retained earnings, endowment, accumulated income, or other funds		32	
	33	Total net assets or fund balances	4,489,361.	33	4,009,738.
	34	Total liabilities and net assets/fund balances	13,421,565.	34	9,493,249.

Part XI Financial Statements and Reporting

	Yes	No
1 Accounting method used to prepare the Form 990: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other		
2a Were the organization's financial statements compiled or reviewed by an independent accountant?		X
b Were the organization's financial statements audited by an independent accountant?		X
c If "Yes" to lines 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?		
3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		X
b If "Yes," did the organization undergo the required audit or audits?		

SCHEDULE C
(Form 990 or 990-EZ)

Political Campaign and Lobbying Activities

OMB No. 1545-0047

For Organizations Exempt From Income Tax Under section 501(c) and section 527

2008
Open to Public Inspection

Department of the Treasury
Internal Revenue Service

▶ To be completed by organizations described below.

▶ Attach to Form 990 or Form 990-EZ.

If the organization answered "Yes," to Form 990, Part IV, line 3, or Form 990-EZ, Part VI, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations: Complete Parts I-A and B. Do not complete Part I-C.
- Section 501(c) (other than section 501(c)(3)) organizations: Complete Parts I-A and C below. Do not complete Part I-B.
- Section 527 organizations: Complete Part I-A only.

If the organization answered "Yes," to Form 990, Part IV, line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)): Complete Part II-A. Do not complete Part II-B.
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)): Complete Part II-B. Do not complete Part II-A.

If the organization answered "Yes," to Form 990, Part IV, line 5 (Proxy Tax), then

- Section 501(c)(4), (5), or (6) organizations: Complete Part III.

Name of organization

CALIFORNIA SCHOOL BOARDS ASSOCIATION

Employer identification number

94-1510492

Part I-A To be completed by all organizations exempt under section 501(c) and section 527 organizations.

See the instructions for Schedule C for details.

- 1 Provide a description of the organization's direct and indirect political campaign activities in Part IV.
- 2 Political expenditures ▶ \$ _____
- 3 Volunteer hours ▶ _____

Part I-B To be completed by all organizations exempt under section 501(c)(3).

See the instructions for Schedule C for details.

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 ▶ \$ _____
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 ▶ \$ _____
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? Yes No
- 4a Was a correction made? Yes No
- b If "Yes," describe in Part IV.

Part I-C To be completed by all organizations exempt under section 501(c), except section 501(c)(3).

See the instructions for Schedule C for details.

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ▶ \$ _____
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ▶ \$ _____
- 3 Total of direct and indirect exempt function expenditures. Add lines 1 and 2 and enter here and on Form 1120-POL, line 17b ▶ \$ _____
- 4 Did the filing organization file Form 1120-POL for this year? Yes No
- 5 State the names, addresses and employer identification number (EIN) of all section 527 political organizations to which payments were made. Enter the amount paid and indicate if the amount was paid from the filing organization's funds or were political contributions received and promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC). If additional space is needed, provide information in Part IV.

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds. If none, enter -0-.	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization. If none, enter -0-.

Part II-A To be completed by organizations exempt under section 501(c)(3) that filed Form 5768 (election under section 501(h)). See the instructions for Schedule C for details.

- A Check if the filing organization belongs to an affiliated group.
 B Check if the filing organization checked box A and "limited control" provisions apply.

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing organization's totals	(b) Affiliated group totals												
1 a	Total lobbying expenditures to influence public opinion (grassroots lobbying)														
b	Total lobbying expenditures to influence a legislative body (direct lobbying)														
c	Total lobbying expenditures (add lines 1a and 1b)														
d	Other exempt purpose expenditures														
e	Total exempt purpose expenditures (add lines 1c and 1d)														
f	Lobbying nontaxable amount. Enter the amount from the following table in both columns.														
<table border="1"> <thead> <tr> <th>If the amount on line 1e, column (a) or (b) is:</th> <th>The lobbying nontaxable amount is:</th> </tr> </thead> <tbody> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 1e.</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000.</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000.</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000.</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000.</td> </tr> </tbody> </table>		If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e.	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.	Over \$17,000,000	\$1,000,000.		
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
Not over \$500,000	20% of the amount on line 1e.														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000.														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000.														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000.														
Over \$17,000,000	\$1,000,000.														
g	Grassroots nontaxable amount (enter 25% of line 1f)														
h	Subtract line 1g from line 1a. Enter -0- if line g is more than line a														
i	Subtract line 1f from line 1c. Enter -0- if line f is more than line c														
j	If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?														

Yes No

4-Year Averaging Period Under Section 501(h)
 (Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 2a through 2f of the instructions.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) Total
2 a	Lobbying non-taxable amount				
b	Lobbying ceiling amount (150% of line 2a, column(e))				
c	Total lobbying expenditures				
d	Grassroots non-taxable amount				
e	Grassroots ceiling amount (150% of line 2d, column (e))				
f	Grassroots lobbying expenditures				

Part II-B To be completed by organizations exempt under section 501(c)(3) that have NOT filed Form 5768 (election under section 501(h)). See the instructions for Schedule C for details.

	(a)		(b)
	Yes	No	Amount
1 During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of:			
a Volunteers?			
b Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?			
c Media advertisements?			
d Mailings to members, legislators, or the public?			
e Publications, or published or broadcast statements?			
f Grants to other organizations for lobbying purposes?			
g Direct contact with legislators, their staffs, government officials, or a legislative body?			
h Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means?			
i Other activities? If "Yes," describe in Part IV			
j Total lines 1c through 1i			
2a Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?			
b If "Yes," enter the amount of any tax incurred under section 4912			
c If "Yes," enter the amount of any tax incurred by organization managers under section 4912			
d If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?			

Part III-A To be completed by all organizations exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6). See the instructions for Schedule C for details.

	Yes	No
1 Were substantially all (90% or more) dues received nondeductible by members?	X	
2 Did the organization make only in-house lobbying expenditures of \$2,000 or less?		X
3 Did the organization agree to carryover lobbying and political expenditures from the prior year?		X

Part III-B To be completed by all organizations exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) if BOTH Part III-A, questions 1 and 2 are answered "No" OR if Part III-A, question 3 is answered "Yes." See Schedule C instructions for details.

1 Dues, assessments and similar amounts from members	1	
2 Section 162(e) non-deductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).		
a Current year	2a	
b Carryover from last year	2b	
c Total	2c	
3 Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
4 If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	
5 Taxable amount of lobbying and political expenditures (line 2c total minus 3 and 4)	5	

Part IV Supplemental Information

Complete this part to provide the descriptions required for Part I-A, line 1; Part I-B, line 4; Part I-C, line 5; and Part II-B, line 1i. Also, complete this part for any additional information.

Schedule D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Attach to Form 990. To be completed by organizations that answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.

OMB No. 1545-0047

2008

Open to Public Inspection

Name of the organization

CALIFORNIA SCHOOL BOARDS ASSOCIATION

Employer identification number
94-1510492

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year		
2 Aggregate contributions to (during year)		
3 Aggregate grants from (during year)		
4 Aggregate value at end of year		
5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? <input type="checkbox"/> Yes <input type="checkbox"/> No		
6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or other impermissible private benefit? <input type="checkbox"/> Yes <input type="checkbox"/> No		

Part II Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply).

Preservation of land for public use (e.g., recreation or pleasure) Preservation of an historically important land area

Protection of natural habitat Preservation of certified historic structure

Preservation of open space

2 Complete lines 2a-2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year.

	Held at the End of the Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a)	2c
d Number of conservation easements included in (c) acquired after 8/17/06	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, violations, and enforcement of the conservation easements it holds? Yes No

6 Staff or volunteer hours devoted to monitoring, inspecting, and enforcing easements during the year ▶ _____

7 Amount of expenses incurred in monitoring, inspecting, and enforcing easements during the year ▶ \$ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? Yes No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items:

(i) Revenues included in Form 990, Part VIII, line 1 ▶ \$ _____

(ii) Assets included in Form 990, Part X ▶ \$ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items:

a Revenues included in Form 990, Part VIII, line 1 ▶ \$ _____

b Assets included in Form 990, Part X ▶ \$ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply):

- a Public exhibition
- b Scholarly research
- c Preservation for future generations
- d Loan or exchange programs
- e Other _____

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Yes No

Part IV Trust, Escrow and Custodial Arrangements. Complete if organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? Yes No

b If "Yes," explain the arrangement in Part XIV and complete the following table:

	Amount
1c	
1d	
1e	
1f	

- c Beginning balance
- d Additions during the year
- e Distributions during the year
- f Ending balance

2a Did the organization include an amount on Form 990, Part X, line 21? Yes No

b If "Yes," explain the arrangement in Part XIV.

Part V Endowment Funds. Complete if organization answered "Yes" to Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions					
c Investment earnings or losses					
d Grants or scholarships					
e Other expenditures for facilities and programs					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the year end balance held as:

- a Board designated or quasi-endowment %
- b Permanent endowment %
- c Term endowment %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:

	Yes	No
(i) unrelated organizations	3a(i)	
(ii) related organizations	3a(ii)	
b If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?	3b	

4 Describe in Part XIV the intended uses of the organization's endowment funds.

Part VI Investments - Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Depreciation	(d) Book value
1a Land		589,304.		589,304.
b Buildings		2,577,717.	1,435,269.	1,142,448.
c Leasehold improvements		40,413.	40,413.	0.
d Equipment				
e Other		1,039,658.	762,968.	276,690.
Total. Add lines 1a-1e. (Column (d) should equal Form 990, Part X, column (B), line 10(c).)				2,008,442.

Part VII Investments - Other Securities. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
Financial derivatives and other financial products		
Closely-held equity interests		
Other		
Total. (Col (b) should equal Form 990, Part X, col (B) line 12.) ▶		

Part VIII Investments - Program Related. See Form 990, Part X, line 13.

(a) Description of investment type	(b) Book value	(c) Method of valuation: Cost or end-of-year market value
Total. (Col (b) should equal Form 990, Part X, col (B) line 13.) ▶		

Part IX Other Assets. See Form 990, Part X, line 15.

(a) Description	(b) Book value
INTERCOMPANY RECEIVABLES	2,003,627.
Total. (Column (b) should equal Form 990, Part X, col (B) line 15.) ▶	2,003,627.

Part X Other Liabilities. See Form 990, Part X, line 25.

(a) Description of liability	(b) Amount	
Federal income taxes		
COMPENSATED ABSENCES	496,408.	
INTERCOMPANY PAYABLES	2,880,880.	
Total. (Column (b) should equal Form 990, Part X, col (B) line 25.) ▶	3,377,288.	

In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48.

Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1
2	Total expenses (Form 990, Part IX, column (A), line 25)	2
3	Excess or (deficit) for the year. Subtract line 2 from line 1	3
4	Net unrealized gains (losses) on investments	4
5	Donated services and use of facilities	5
6	Investment expenses	6
7	Prior period adjustments	7
8	Other (Describe in Part XIV)	8
9	Total adjustments (net). Add lines 4-8	9
10	Excess or (deficit) for the year per financial statements. Combine lines 3 and 9	10

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:	
a	Net unrealized gains on investments	2a
b	Donated services and use of facilities	2b
c	Recoveries of prior year grants	2c
d	Other (Describe in Part XIV)	2d
e	Add lines 2a through 2d	2e
3	Subtract line 2e from line 1	3
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:	
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a
b	Other (Describe in Part XIV)	4b
c	Add lines 4a and 4b	4c
5	Total revenue. Add lines 3 and 4c. (This should equal Form 990, Part I, line 12.)	5

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:	
a	Donated services and use of facilities	2a
b	Prior year adjustments	2b
c	Losses reported on Form 990, Part IX, line 25	2c
d	Other (Describe in Part XIV)	2d
e	Add lines 2a through 2d	2e
3	Subtract line 2e from line 1	3
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:	
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a
b	Other (Describe in Part XIV)	4b
c	Add lines 4a and 4b	4c
5	Total expenses. Add lines 3 and 4c. (This should equal Form 990, Part I, line 18.)	5

Part XIV Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b.

**SCHEDULE I
(Form 990)**

Department of the Treasury
Internal Revenue Service

**Grants and Other Assistance to Organizations,
Governments, and Individuals in the U.S.**

▶ **Complete if the organization answered "Yes," on Form 990, Part IV, lines 21 or 22.
▶ Attach to Form 990.**

OMB No. 1545-0047
2008

Open to Public
Inspection

Name of the organization **CALIFORNIA SCHOOL BOARDS ASSOCIATION** Employer identification number **94-1510492**

Part I General Information on Grants and Assistance

1 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? Yes No

2 Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use Part IV and Schedule I-1 (Form 990) if additional space is needed ...

1 (a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CALIFORNIA SCHOOL BOARDS FOUNDATION - PO BOX 1660 - WEST SACRAMENTO, CA 95691	94-1623582	501(C)(3)	764,083.	0.			SUPPORT OF EXEMPT PURPOSE

2 Enter total number of section 501(c)(3) and government organizations **1.**

3 Enter total number of other organizations **1.**

Part II Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 22. Use Schedule I-1 (Form 990) if additional space is needed.

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of non-cash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of non-cash assistance

Part IV Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information.

SCHEDULE I, PART I, LINE 2: CALIFORNIA SCHOOL BOARDS ASSOCIATION (CSBA)
 PROVIDES SUPPORT TO CALIFORNIA SCHOOL BOARDS FOUNDATION (CSBF), A RELATED
 PARTY OF CSBA, IN RELATION TO ITS EXEMPT PURPOSE.

**SCHEDULE J
(Form 990)**

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Attach to Form 990. To be completed by organizations that answered "Yes" to Form 990, Part IV, line 23.

OMB No. 1545-0047

2008

Open to Public Inspection

Name of the organization

CALIFORNIA SCHOOL BOARDS ASSOCIATION

Employer identification number

94-1510492

Part I Questions Regarding Compensation

1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.

- | | |
|--|--|
| <input type="checkbox"/> First-class or charter travel | <input type="checkbox"/> Housing allowance or residence for personal use |
| <input checked="" type="checkbox"/> Travel for companions | <input type="checkbox"/> Payments for business use of personal residence |
| <input type="checkbox"/> Tax indemnification and gross-up payments | <input type="checkbox"/> Health or social club dues or initiation fees |
| <input checked="" type="checkbox"/> Discretionary spending account | <input type="checkbox"/> Personal services (e.g., maid, chauffeur, chef) |

b If line 1a is checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain

2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?

3 Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director. Check all that apply.

- | | |
|---|---|
| <input checked="" type="checkbox"/> Compensation committee | <input checked="" type="checkbox"/> Written employment contract |
| <input checked="" type="checkbox"/> Independent compensation consultant | <input checked="" type="checkbox"/> Compensation survey or study |
| <input checked="" type="checkbox"/> Form 990 of other organizations | <input checked="" type="checkbox"/> Approval by the board or compensation committee |

4 During the year, did any person listed in Form 990, Part VII, Section A, line 1a:

- a** Receive a severance payment or change of control payment? **4a** Yes No
- b** Participate in, or receive payment from, a supplemental nonqualified retirement plan? **4b** Yes No
- c** Participate in, or receive payment from, an equity-based compensation arrangement? **4c** Yes No
- If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.

Only 501(c)(3) and 501(c)(4) organizations must complete lines 5-8.

5 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of:

- a** The organization? **5a** Yes No
- b** Any related organization? **5b** Yes No
- If "Yes," to line 5a or 5b, describe in Part III.

6 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of:

- a** The organization? **6a** Yes No
- b** Any related organization? **6b** Yes No
- If "Yes" to line 6a or 6b, describe in Part III.

7 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III **7** Yes No

8 Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs. section 53.4958-4(a)(3)? If "Yes," describe in Part III **8** Yes No

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2008

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use Schedule J-1 if additional space is needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that are not listed on Form 990, Part VII.

Note. The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a.

(A) Name	(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ
	(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other compensation				
SCOTT P. PLOTKIN	(i) 289,973.	(ii) 175,000.	(iii) 51,545.	40,534.	5,281.	562,333.	281,167.
	(ii) 0.	0.	0.	0.	0.	0.	0.
MARTIN GONZALEZ	(i) 180,248.	(ii) 15,000.	(iii) 1,450.	26,361.	10,486.	233,545.	116,773.
	(ii) 0.	0.	0.	0.	0.	0.	0.
RICHARD W. PRATT	(i) 151,775.	(ii) 0.	(iii) 2,006.	21,857.	8,396.	184,034.	92,017.
	(ii) 0.	0.	0.	0.	0.	0.	0.
DALE M. TOM	(i) 148,800.	(ii) 150.	(iii) 1,414.	20,994.	7,221.	178,579.	89,290.
	(ii) 0.	0.	0.	0.	0.	0.	0.
JEFFREY A. VACA	(i) 147,630.	(ii) 0.	(iii) 1,026.	21,981.	10,139.	180,776.	90,388.
	(ii) 0.	0.	0.	0.	0.	0.	0.
RICHARD L. HAMILTON	(i) 130,478.	(ii) 2,869.	(iii) 3,467.	19,399.	8,797.	165,010.	82,505.
	(ii) 0.	0.	0.	0.	0.	0.	0.
	(i) 0.	0.	0.	0.	0.	0.	0.
	(ii) 0.	0.	0.	0.	0.	0.	0.
	(i) 0.	0.	0.	0.	0.	0.	0.
	(ii) 0.	0.	0.	0.	0.	0.	0.
	(i) 0.	0.	0.	0.	0.	0.	0.
	(ii) 0.	0.	0.	0.	0.	0.	0.
	(i) 0.	0.	0.	0.	0.	0.	0.
	(ii) 0.	0.	0.	0.	0.	0.	0.
	(i) 0.	0.	0.	0.	0.	0.	0.
	(ii) 0.	0.	0.	0.	0.	0.	0.

Part II Supplemental Information

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8. Also complete this part for any additional information.

PART I, LINE 1A: EXECUTIVE DIRECTOR'S ANNUAL ALLOWANCES: ADMINISTRATIVE

ALLOWANCE (\$9,000), CAR ALLOWANCE (\$10,200), COMPANION TRAVEL (UP TO \$3,000), CHOICE OF TAX DEFERRED ANNUITY (UP TO 10% OF ANNUAL GROSS SALARY).

PART I, LINE 1B: ALL TERMS AND CONDITIONS ARE PART OF ORIGINAL CONTRACT FOR SERVICES AND AMENDMENTS.

PART I, LINE 4A: PAULA JOHNS RECEIVED A SEVERANCE PAYMENT IN THE AMOUNT OF \$19,103.01. A FORMER EMPLOYEE WAS SEPARATED FROM EMPLOYMENT AS AN AT-WILL EMPLOYEE AND WAS PROVIDED THE ABOVE SEVERANCE PACKAGE TO ASSIST HER WHILE SHE SEARCHED FOR FUTURE EMPLOYMENT OPPORTUNITIES. EMPLOYEE HAS NO RETURN RIGHTS TO HER FORMER POSITION.

SCHEDULE J-2
(Form 990)

Continuation Sheet for Form 990

OMB No. 1545-0047

2008

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 990 to list additional information for Form 990, Part VII, Section A, line 1a.

Open to Public
Inspection

Name of the Organization

CALIFORNIA SCHOOL BOARDS ASSOCIATION

Employer Identification number
94-1510492

Part I Continuation of Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
BEN LIAO DIRECTOR-AT-LARGE	1.00	X					0.	0.	0.	
EMMA TURNER DIRECTOR-AT-LARGE	1.00	X					0.	0.	0.	
SUSAN HEREDIA PH.D. DIRECTOR-AT-LARGE	1.00	X					0.	0.	0.	
SARA WILKINS DIRECTOR-AT-LARGE	1.00	X					0.	0.	0.	
KERRY CLEGG PH.D. NSBA BOARD OF DIRECTOR	1.00	X					0.	0.	0.	
SCOTT P. PLOTKIN EXECUTIVE DIRECTOR	25.00			X			516,518.	0.	45,815.	
MARTIN GONZALEZ ASST EXECUTIVE DIRECTOR	25.00			X			196,698.	0.	36,847.	
RICHARD W. PRATT ASST EXECUTIVE DIRECTOR	40.00			X			153,781.	0.	30,253.	
DALE M. TOM ASST EXECUTIVE DIRECTOR	38.00			X			150,364.	0.	28,215.	
JEFFREY A. VACA ASST EXECUTIVE DIRECTOR	30.00				X		148,656.	0.	32,120.	
HOLLY COVIN JACOBSON ASST EXECUTIVE DIRECTOR	33.20				X		113,606.	0.	24,988.	
RICHARD L. HAMILTON ACTING GENERAL COUNSEL	40.00				X		136,814.	0.	28,196.	
PAULA D. JOHNS SR. PROJECT CONSULTANT	40.00				X		123,642.	0.	19,104.	
ERIKA K. HOFFMAN PRINC LEGISLATIVE ADVOC	40.00				X		117,644.	0.	24,027.	

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

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Name of the organization

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94-1510492

FORM 990, PART III, LINE 1, DESCRIPTION OF ORGANIZATION MISSION:

DISTRICT AND COUNTY LEVELS.

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS

AGENDA ONLINE IS A PAPERLESS BOARD MEETING SERVICE WHICH ELIMINATES THE NEED FOR HARD COPIES OF AGENDAS AND RELATED BACKGROUND MATERIAL. THIS SERVICE SAVES THE DISTRICT STAFF TIME AS WELL AS COST SAVINGS.

POLICY DEVELOPMENT WORKSHOPS ARE DESIGNED TO BRING TOGETHER THE EXPERTISE AND EXPERIENCE OF DISTRICT ADMINISTRATORS AND/OR BOARD MEMBERS WITH A CSBA CONSULTANT TO PRODUCE A DISTRICT POLICY MANUAL THAT COMPLIES WITH STATE AND FEDERAL LAW AND MEETS LOCAL NEEDS.

SCHOOL DISTRICTS AND COUNTY OFFICES OF EDUCATION ARE ELIGIBLE TO CONTRACT FOR POLICY MANUAL MAINTENANCE IF THEY'VE COMPLETED A CSBA INDIVIDUAL DISTRICT POLICY WORKSHOP OR MAINTAINED AN UP-TO-DATE MANUAL USING THE CSBA POLICY UPDATE SERVICE AND COPYRIGHTED NUMBERING SYSTEM.

FORM 990, PART III, LINE 4B, PROGRAM SERVICE ACCOMPLISHMENTS

PROJECTS AND CASES.

FORM 990, PART III, LINE 4D, OTHER PROGRAM SERVICES:

CONTINUING EDUCATION: CSBA PROVIDES TRAINING, SUPPORT, RESOURCES AND INSPIRATION TO GOVERNING BOARDS AND SUPERINTENDENTS TO MAXIMIZE THEIR EFFECTIVENESS IN CARRYING OUT THEIR CRITICAL LEADERSHIP FUNCTIONS. THE

TRAINING OPPORTUNITIES PROVIDED BY THE CONTINUING EDUCATION DEPARTMENT

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

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2008
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Name of the organization

CALIFORNIA SCHOOL BOARDS ASSOCIATION

Employer identification number
94-1510492

ARE ORGANIZED INTO FIVE MAJOR AREAS: BOARDSMANSHIP, STUDENT LEARNING AND ACHIEVEMENT, EDUCATIONAL POLICY AND ISSUES, SCHOOL GOVERNANCE AND OPERATIONS, AND PROFESSIONAL DEVELOPMENT. CONTINUING EDUCATION ALSO CONDUCTS AN ANNUAL CONFERENCE TO ADDRESS THE NEEDS AND CONCERNS OF SCHOOL BOARD MEMBERS, SUPERINTENDENTS, PRINCIPAL AND ADMINISTRATIVE STAFF. EDUCATION TOPICS AND ISSUES FOR ALL SCHOOL BOARD MEMBERS IN THE STATE OF CALIFORNIA. CSBA'S ANNUAL CONFERENCE DRAWS MORE THAN 3,500 EDUCATORS TO ACTIVELY PARTICIPATE IN CALIFORNIA'S MOST COMPREHENSIVE EDUCATION CONFERENCE.

GOVERNMENTAL RELATIONS: MONITORS AND REPORTS ON ALL BILLS AFFECTING PUBLIC EDUCATION IN CALIFORNIA AND THEIR IMPACT ON ELECTED SCHOOL BOARDS AND K-12 PUBLIC EDUCATION. ALSO PROVIDES INFORMATION ON UTILIZING A 24 HOUR TELEPHONE RECORDING MESSAGE. REPRESENTS 1,000+ DISTRICTS AND 5,000+ SCHOOL BOARD MEMBERS.

POLICY ANALYSIS: PROVIDES ANALYSIS OF MAJOR EDUCATIONAL ISSUES AND PROVIDES INFORMATION ON THOSE ISSUES TO CSBA'S LEADERSHIP AND MEMBERSHIP. THE DEPARTMENT ALSO RESPONDS TO REQUESTS FROM BOARD MEMBERS AND OTHER EDUCATIONAL ORGANIZATIONS, FOR STATISTICS AND OTHER INFORMATION ABOUT EDUCATION IN CALIFORNIA.

EXECUTIVE SEARCH SERVICES: AIDS IN SELECTING NEW SUPERINTENDENTS, CONDUCTS TRAINING ON BOARD RELATIONS, MANAGEMENT, JOB CLASSIFICATIONS AND DESCRIPTIONS.

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No. 1545-0047

2008

Open to Public Inspection

Name of the organization

CALIFORNIA SCHOOL BOARDS ASSOCIATION

Employer identification number

94-1510492

CCBE PROGRAMS: THE CALIFORNIA COUNTY BOARDS OF EDUCATION (CCBE) IS A SUBSET OF CSBA AND HAS HISTORICALLY REPRESENTED COUNTY MEMBER BOARDS.

EXPENSES \$ 3890813. INCLUDING GRANTS OF \$ 0. REVENUE \$ 2360859.

FORM 990, PART VI, SECTION A, LINE 6: YES. BOARD MEMBERS THROUGHOUT THE STATE WHOSE DISTRICTS AND/OR COUNTY OFFICES OF EDUCATION ARE MEMBERS OF CSBA, ELECT BOARD MEMBERS TO SERVE AS DELEGATES TO CSBA'S DELEGATE ASSEMBLY. THE DELEGATES THEN ELECT THE MEMBERS OF THE BOARD OF DIRECTORS AS WELL AS THE OFFICERS OF THE ASSOCIATION.

FORM 990, PART VI, SECTION A, LINE 7A: SEE EXPLANATION TO PART VI, LINE 6.

FORM 990, PART VI, SECTION A, LINE 7B: THE PRESIDENT MAKES APPOINTMENTS TO COMMITTEES AND TASK FORCES; THESE APPOINTMENTS ARE BROUGHT TO THE EXECUTIVE COMMITTEE FOR APPROVAL AND THEN TO THE BOARD OF DIRECTORS FOR RATIFICATION. THE SAME HOLDS TRUE FOR SPONSORED LEGISLATION. ALL DECISIONS BY THE OFFICERS ARE REPORTED TO THE BOARD.

THE MAJORITY OF DECISIONS ARE MADE BY THE BOARD OF DIRECTORS.

THE DELEGATE ASSEMBLY ALSO MAKES DECISIONS SURROUNDING BALLOT MEASURES, POLICY POSITIONS, ETC.

FORM 990, PART VI, SECTION A, LINE 10: THE 990 WILL BE REVIEWED PRIOR TO FILING. THE APPROPRIATE ASSOCIATION STAFF WILL REVIEW ALL DOCUMENTS PRIOR TO DISCUSSION AND REVIEW WITH THE AUDIT COMMITTEE, COMPENSATION REVIEW COMMITTEE, AND THE EXECUTIVE COMMITTEE MEMBERS.

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No. 1545-0047

2008

Open to Public Inspection

Name of the organization

CALIFORNIA SCHOOL BOARDS ASSOCIATION

Employer identification number
94-1510492

FORM 990, PART VI, SECTION B, LINE 12C: CURRENTLY NO ANNUAL DISCLOSURE IS REQUIRED, BUT THE TOPIC IS BEING REVIEWED FOR ITS INCLUSION IN THE BOARD DEVELOPMENT HANDBOOK. THE PROCESS TO MONITOR AND ENFORCE COMPLIANCE WITH THIS POLICY HAS BEEN UNDER DISCUSSION. THIS PROCESS, WHEN FINALIZED, WILL COVER ALL CSBA STAFF, AND RELATED ENTITIES, AND MEMBERS OF THE BOARD OF DIRECTORS.

FORM 990, PART VI, SECTION B, LINE 15: THE COMPENSATION REVIEW COMMITTEE IS COMPOSED OF THE CHAIR OF THE AUDIT COMMITTEE, A MEMBER OF THE AUDIT COMMITTEE, THE CHAIR OF THE BUDGET COMMITTEE, A MEMBER OF THE BUDGET COMMITTEE AND THE IMMEDIATE PAST PRESIDENT OF THE BOARD OF DIRECTORS. THEY REVIEW THE COMPENSATION FOR THE EXECUTIVE DIRECTOR OF CSBA. THE COMMITTEE MEETS TWICE A YEAR TO REVIEW THEIR PROTOCOL AND DATA ASSEMBLED THROUGH PURCHASED DATA (SALARY SOURCE, GUIDESTAR), VOLUNTARY DATA FROM LOCAL ASSOCIATIONS IN THE SACRAMENTO AREA WITH SIMILAR REVENUE AND EMPLOYEE BASE, DATA ASSEMBLED BY THE NATIONAL SCHOOL BOARDS ASSOCIATION, AND GENERAL DATA FROM FOR-PROFIT SACRAMENTO BASED ORGANIZATIONS. IN ADDITION, THE CHAIRS OF THIS COMMITTEE MEET WITH THE EXECUTIVE DIRECTOR TO DISCUSS COMPENSATION REQUESTS FOR THE NEXT YEAR AND CHANGES TO HIS CONTRACT. THE CHAIRS OF THIS COMMITTEE, ON BEHALF OF THE ENTIRE COMMITTEE, FORWARD A WRITTEN RECOMMENDATION LETTER TO THE EXECUTIVE COMMITTEE FOR REVIEW. IN A CLOSED SESSION DURING THE SEPTEMBER BOARD OF DIRECTORS MEETING, THE RECOMMENDATION LETTER IS DISCUSSED WITH THE ENTIRE BOARD OF DIRECTORS AND A FINAL DECISION IS RENDERED. THIS PROCESS WAS LAST USED IN FISCAL YEAR 2008-09.

FORM 990, PART VI, SECTION C, LINE 19: GOVERNING DOCUMENTS ARE ON OUR

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

▶ Attach to Form 990. To be completed by organizations to provide additional information for responses to specific questions for the Form 990 or to provide any additional information.

OMB No. 1545-0047

2008

Open to Public
Inspection

Name of the organization

CALIFORNIA SCHOOL BOARDS ASSOCIATION

Employer identification number
94-1510492

ASSOCIATION WEBSITE. OTHER DOCUMENTS ARE AVAILABLE UPON REQUEST.

FORM 990, PART VI, LINE 1A

CALIFORNIA SCHOOLS BOARDS ASSOCIATION HAS DELEGATED AUTHORITY TO AN EXECUTIVE COMMITTEE. ACCORDING TO THE BYLAWS AND STANDING RULES OF THE ASSOCIATION, THE BOARD OF DIRECTORS AND THE EXECUTIVE COMMITTEE HAVE BEEN DELEGATED AUTHORITY TO TAKE ACTION ON BEHALF OF THE ASSOCIATION. THE EXECUTIVE COMMITTEE IS COMPRISED OF FOUR OFFICERS: PRESIDENT, PRESIDENT-ELECT, VICE PRESIDENT AND IMMEDIATE PAST PRESIDENT.

THE BOARD OF DIRECTORS IS COMPRISED OF 28 DIRECTORS PLUS THE EXECUTIVE COMMITTEE AND IT TOO MAY ACT BETWEEN MEETINGS OF THE DELEGATE ASSEMBLY.

FORM 990, PART IV, LINE 12 AND PART XI, LINE 2

AUDITED FINANCIAL STATEMENTS

THE FINANCIAL STATEMENTS OF THE CALIFORNIA SCHOOL BOARDS ASSOCIATION WERE AUDITED ON A CONSOLIDATED BASIS WITH CALIFORNIA SCHOOL BOARDS FOUNDATION, CALIFORNIA SCHOOL BOARDS FINANCIAL CORPORATION, AND CALIFORNIA SCHOOL BOARDS DISTRICT SERVICES CORPORATION IN ACCORDANCE WITH GAAP.

Part V Transactions With Related Organizations

Note. Complete line 1 if any entity is listed in Parts II, III, or IV.

1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

	Yes	No
a Receipt of (i) interest (ii) annuities (iii) royalties (iv) rent from a controlled entity		X
b Gift, grant, or capital contribution to other organization(s)	X	
c Gift, grant, or capital contribution from other organization(s)		X
d Loans or loan guarantees to or for other organization(s)		X
e Loans or loan guarantees by other organization(s)		X
f Sale of assets to other organization(s)		X
g Purchase of assets from other organization(s)		X
h Exchange of assets		X
i Lease of facilities, equipment, or other assets to other organization(s)		X
j Lease of facilities, equipment, or other assets from other organization(s)		X
k Performance of services or membership or fundraising solicitations for other organization(s)	X	
l Performance of services or membership or fundraising solicitations by other organization(s)	X	
m Sharing of facilities, equipment, mailing lists, or other assets	X	
n Sharing of paid employees	X	
o Reimbursement paid to other organization for expenses		X
p Reimbursement paid by other organization for expenses	X	
q Other transfer of cash or property to other organization(s)		X
r Other transfer of cash or property from other organization(s)		X

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds.

	(A) Name of other organization(s)	(B) Transaction type (a-r)	(C) Amount involved
(1)			
(2)			
(3)			
(4)			
(5)			
(6)			

