

# 2019

## YEAR-IN-REVIEW

Relentless Advocacy

Consistent Leadership

Indispensable Research



# FINANCIAL STRENGTH AND STABILITY



**60%**  
Programs, Other

**40%**  
Membership Dues



**86%**  
Member Services

**14%**  
Administrative



Vernon M. Billy  
CEO & Executive Director

**Fierce legislative battles, wildfires, landmark charter school legislation and the inaugural year of a new Governor highlighted an exceptionally busy 2019 session in the Capitol.** Gov. Gavin Newsom signed 870 bills into law, almost 100 of which will directly impact public schools. Over the course of the year, CSBA worked hard and strove to defend local governing board authority, advance equity and hold the state accountable for meeting its financial and constitutional obligations to schools.

Our efforts took many forms over the past year, including aggressively pursuing legal remedies in the courts through CSBA's Education Legal Alliance (ELA). The year's biggest legal victory came as a result of a settlement agreement between CSBA and the State of California over the state's manipulation of the Proposition 98 guarantee in 2018. As a result of the settlement, the state agreed to immediately repay schools \$686 million. As governing boards struggle to do more with insufficient levels of funding, victories like this one are critically important.

CSBA has consistently made the case that California schools need more resources to support students, and, last January, Gov. Newsom responded. Speaking before a televised audience, the Governor explained his decision to allocate \$3 billion outside of Prop 98 funds toward school pension costs. He noted, "I will never forget our school boards association meeting, where they almost, quite literally, didn't want to talk about anything else. This is a big deal. This is not paying down the state's obligations; this is helping relieve the districts' burdens."

The Governor's remarks are a testament to the strength of our organization and the persistence of our members to secure more funding to support school districts and county offices of education. This persistence also helped to secure some of the most significant charter school reforms, including greater transparency and accountability for charter school governing boards and enhanced discretion and authority for authorizing local educational agencies. With the enactment of Senate Bill 126 and Assembly Bills 1505 and 1507, charter schools are now required to follow the same rules regarding open meetings, public records and conflicts of interest that other public schools must observe. In addition, the new laws grant charter authorizers the ability to consider the impact of charter schools on district finances and programs, retain the role of county office of education boards in the charter petition appeal process and eliminate the State Board of Education's authority to approve statewide charter petitions. All told, seven of the nine recommendations contained in CSBA's November 2018 charter schools report, *Uncharted Waters: Recommendations for Prioritizing Student Achievement and Effective Governance in California Charter Schools*, were enacted by the state.

Our advocacy and legal efforts are intended to advance and complement the most important work board members do — governing to advance student achievement and civic opportunity. Governing can be challenging work, and we continue to identify and develop new ways to support board members in this endeavor. This year, we debut our new Online Learning Center in an effort to provide greater access to CSBA's professional development content. Governing is not easy, and we want to provide all our members with expanded learning opportunities that support the work of board members at the local level.

Thank you for your support of CSBA during the past year and for the work you do on behalf of students. Your role as stewards of public education is critical to the future success of our schools, and we will be unwavering in our commitment to supporting you in this vitally important role.

A handwritten signature in black ink, reading "Vernon M. Billy". The signature is fluid and cursive, with the first name "Vernon" and last name "Billy" clearly legible, and "M." as a middle initial.

Vernon M. Billy  
*CEO & Executive Director*

# csba Officers



**Dr. Emma Turner**  
President



**Xilonin Cruz-Gonzalez**  
President-elect



**Tamara Otero**  
Vice President



**Mike Walsh**  
Immediate Past President

## 2019 BOARD OF DIRECTORS

**Frank Magarino**, Region 1

**Sherry Crawford**, Region 2

**A.C. "Tony" Ubalde, Jr.**, Region 3

**Paige Stauss**, Region 4

**Alisa MacAvoy**, Region 5

**Darrel Woo**, Region 6

**Yolanda Peña Mendrek**, Region 7

**Matthew Balzarini**, Region 8

**Tami Gunther**, Region 9

**Susan Markarian**, Region 10

**Suzanne Kitchens**, Region 11

**William Farris**, Region 12

**Meg Cutuli**, Region 15

**Karen Gray**, Region 16

**Katie Dexter**, Region 17

**Wendy Jonathan**, Region 18

**Albert Gonzalez**, Region 20

**Kelly Gonez**, Region 21

**Nancy Smith**, Region 22

**Helen Hall**, Region 23

**Donald E. LaPlante**, Region 24

**Crystal Martinez-Alire**,  
Director-at-Large, American Indian

**Gino Kwok**, Director-at-Large,  
Asian/Pacific Islander

**Bettye Lusk**, Director-at-Large,  
African American

**Heidi Weiland**, Director-at-Large, County

**Joaquin Rivera**, Director-at-Large, Hispanic

**Chris Ungar**, NSBA Director

**Dana Dean**, CCBE President



### Professional Development

- ▶ **Premiered the new CSBA Online Learning Center**, which provides remote access to high-quality continuous learning and professional development for members anywhere, anytime across the state.
- ▶ **Offered 50 training sessions at sites throughout the state, giving members increased access to continuous learning and professional development opportunities.** Topics included: Orientation for New Trustees, Legal Symposium, Board Presidents Workshop, School Facilities Forum, Brown Act, Institute for New and First-Term Board Members, Student Board Member Training, Executive Assistants Training and the Masters in Governance certificate program.
- ▶ **Held 97 customized Governance Consulting Services workshops** for governing boards throughout California that helped boards from small, medium and large districts increase their effectiveness.
- ▶ **Supported 56 districts in using CSBA's online board self-evaluation survey** as a tool for generating meaningful discussion around board roles, responsibilities, protocols and effective governance practices.
- ▶ **Graduated 191 board members and superintendents from MIG programs** offered at various locations throughout the state including Sonoma, Santa Barbara, San Diego, San Bernardino, Santa Clara, Shasta and Humboldt.
- ▶ **Recognized over 700 graduates of the MIG program** at the MIG Alumni Association Graduate Reception at the Annual Education Conference.
- ▶ **Developed and executed the 2019 iCount Member Census to gather critical data about our members in order to better inform the direction of our future products and services.** Deployed exclusively on a digital platform for the first time, CSBA's redesigned census launched at the 2019 Annual Education Conference and Trade Show in San Diego.



- ▶ **Recognized 57 outstanding program and governance practices operated by school districts and county offices of education through CSBA's 40th annual Golden Bell awards.** These exemplary programs reflect the creativity and innovation that members use to develop programs that address students' changing needs.

**CSBA's**

## **GOLDEN AWARDS**

Golden Bell, Golden Quill and Board Member of the Year.



- ▶ **Awarded 19 winners in print, broadcast and online news media for fair, insightful and accurate reporting on public schools through the CSBA Golden Quill awards.** These journalists are recognized for the essential role they play in increasing understanding of the objectives, operations, accomplishments, challenges and opportunities related to public schools.
- ▶ **Piloted the CSBA Board Member of the Year award and inducted the first winner into the CSBA Golden Gavel Hall of Fame.** The Board Member of the Year is awarded to an individual school board member who exemplifies best practices in effective governance and boardsmanship.
- ▶ **Convened the Executive Assistant Advisory Council** to provide input on the content framework, goals and delivery for expanded offerings that will help Executive Assistants throughout the state work more efficiently and more effectively.
- ▶ **CSBA's 2019 Annual Education Conference and Trade Show**, the largest and most comprehensive education conference in California, attracted more than 4,500 school board members, superintendents, faculty, staff and education advocates.

## Research & Programs

- ▶ **Expanded CSBA's Equity Network** by convening a new cohort of 20 participants while simultaneously supporting the previous year's participants with implementation of their Equity Action Plans. The Equity Network, supported by the Stuart Foundation, increased CSBA's capacity to help board members close opportunity and achievement gaps in LEAs statewide. The project also informed additional CSBA projects, including the CSBA Equity Statement, a governance brief and an online learning module.
- ▶ **Developed a CSBA Equity Statement to reinforce CSBA's mission of ensuring a high-quality education for every student**, provide a frame for the organization's policy and advocacy work, and facilitate board member training initiatives.
- ▶ **Created a series of STEM resources focused on supporting and expanding access to rigorous STEM coursework and standards implementation.** Developed with the support of the S.D. Bechtel Jr. Foundation, the resources included two governance briefs, videos and updated policies. CSBA also convened a STEM Board Member Advisory group to discuss relevant topics related to STEM access and implementation.
- ▶ **Published a five-part special education report, *The Landscape of Special Education in California: A Primer for Board Members*.** The report provided new and veteran trustees with a foundational understanding of key issues related to governance in support of students with disabilities.
- ▶ **Published 21 policy briefs and fact sheets to inform governing board members and assist them in decision-making on critical issues** affecting academic achievement, equity and the well-being of students.
- ▶ **Organized and facilitated two Professional Learning Networks for the California Collaborative for Educational Excellence**, supporting pairs of trustees and superintendents in the development of continuous improvement efforts and LCFF implementation. From this work, both PLNs contributed to a framework for the board member role in Local Control and Accountability Plan development, published as a brief.
- ▶ **Represented CSBA in the State Board of Education's stakeholder engagement for the development of a statewide indicator to measure student growth on the Smarter Balanced Assessments.**





## County Boards of Education

- ▶ **Advocated for significant changes to Assembly Bill 1505**, which, as originally written, could have eliminated the authority of county boards of education to authorize charter schools and to hear appeals of petition or reauthorization denials. After extensive input by the California County Boards of Education in partnership with CSBA and CSBA's lobbying efforts, the bill was amended to maintain and enhance county board authority in these areas and to help protect all governing boards from unnecessary litigation.
- ▶ **In 2019 CSBA began publishing regular county policy updates in January and July to augment the county office of education policy manual.** Among the new county policies added in 2019 were:
  - BP 0410 – Nondiscrimination in County Office Programs and Activities
  - BP 5145.3 – Nondiscrimination/Harassment
  - BP/AR 5145.7 – Sexual Harassment
  - BP 5131.2 – Bullying
  - BP 5141.52 – Suicide Prevention

Revisions were made to several board bylaws as well as:

- BP 0460 – Local Control and Accountability Plan
  - BP 1112 – Media Relations
  - BP 3100 – Budget Adoption and Revision
- ▶ **Conducted the 2019 County Board Governance statewide workshop** on March 8–9. More than 40 county board members and superintendents attended this CSBA-led training, which provided in-depth learning opportunities on charter schools, the role of Special Education Local Plan Areas in the county office of education structure, advocacy 101, shared governance, COE funding and LCAPs, California School Dashboard and networking opportunities.



- ▶ **CSBA's aggressive advocacy focused on pension relief led to the Governor allocating \$3 billion outside of Proposition 98 funds in the 2019–20 state budget** to help local educational agencies reduce their CalPERS and CalSTRS obligations. The funding marked the first time in recent history that the state dedicated money for public schools in excess of the Proposition 98 guarantee. Investments from the state to assist LEAs with pension obligations have been a top priority for CSBA in recent years — the investments made in the 2019–20 budget reduce employer contribution rates to each system by more than 1 percent for the current year, with additional reductions in years to come.
- ▶ **Recommendations from CSBA's Charter Schools Task Force and its 2018 report *Uncharted Waters* influenced 2019 legislation that made sweeping changes to the charter school petition and renewal processes**, including allowing authorizing districts to consider the impact to district finances and to existing district programs when considering a charter school petition and the elimination of exemptions that allowed charter schools to operate outside of the boundaries of the authorizing district. For years, CSBA has been a leading voice calling for sensible charter school laws. In 2019, those efforts produced concrete benefits for local communities and bolstered district and county board governing authority.
- ▶ **Persistent advocacy secured the passage of long-sought charter school transparency laws.** After more than a decade and several sponsored bills that were vetoed by two prior governors, Senate Bill 126 (Leyva and O'Donnell) was signed into law by Gov. Newsom in March, requiring charter school adherence to transparency, accountability and open meeting laws that have long applied to traditional public schools.



## ADVOCACY & COMMUNICATIONS

- ▶ **Advocated for a \$15 billion school facilities bond in 2020.** CSBA collaborated on the development of Assembly Bill 48 (O'Donnell), which placed a \$15 billion school facilities bond on the March 3, 2020, statewide ballot. The bond, if passed, would allocate \$9 billion toward K-12 education and make several programmatic changes to the school facilities program that benefit smaller school districts and lower-income schools.
- ▶ **Convened the 2019 Legislative Action Day,** an event that attracted 263 board members and superintendents, including more than 50 newly elected trustees, to the Capitol. CSBA members met with more than 100 legislators at the Capitol to discuss Full & Fair Funding<sup>SM</sup>, the state budget and CSBA co-sponsored bills on career technical education, special education, home-to-school transportation, student assessments and more.
- ▶ **Increased federal advocacy efforts with multiple trips to Washington, D.C., and co-sponsorship of a special education bill.** CSBA's trips to the nation's capital in 2019 focused on several issues, including special education, culminating in the CSBA-ACSA Federal Partnership putting forward the "Funding Early Childhood is the Right IDEA Act" in July. Introduced by Congressman Mark DeSaulnier (D-CA) and Rodney Davis (R-IL), H.R. 4107 would increase funding over the next four fiscal years for infants and toddlers and for preschool-aged children under parts of the Individuals with Disabilities Education Act.



- ▶ **Expanded the CSBA Public Affairs and Community Engagement Representative (PACER) program to cover more than two-thirds of the state.** The PACER program is now two-thirds of the way to its goal of encompassing every area of California. Ten PACERs now represent more than 70 percent of the state's population and its students, and nearly half of its LEAs. PACERs work daily to connect members to CSBA services and training, establish two-way communication between CSBA and its school districts and county offices of education, and facilitate stronger relationships between board members, local officials and the Legislature.
- ▶ **Debuted the "State Board Report" eblast providing extensive coverage of developments and decisions at the State Board of Education.** The report also includes regular updates on work from the California Department of Education, the California Collaborative for Educational Excellence, State Allocation Board and other major state agencies that impact public schools.
- ▶ **Informed membership of major developments affecting public schools** through four issues of *California Schools* magazine; 11 newsletters; 50 weekly update eblasts; 48 "In the News" eblasts; and more than 170 blog posts.



- ▶ **Quoted or referenced in more than 2,200 news stories as an advocate for public schools.** In 2019, CSBA was cited in major California and national media outlets including ABC News, Associated Press, *CalMatters*, CNBC, *East Bay Times*, *EdSource*, *Education Week*, *Fresno Bee*, *Los Angeles Times*, NBC News, *New York Times*, NPR, *Politico*, *Sacramento Bee*, *San Diego Union-Tribune*, *San Francisco Chronicle*, *San Jose Mercury News* and the *Washington Post*.



- ▶ **Secured hundreds of millions of dollars in additional funding and prevented billions in potential losses for public schools through** effective legal challenges brought by CSBA and its Education Legal Alliance. CSBA and its ELA reached a settlement with the state in a trio of lawsuits related to Proposition 98. In all three cases, CSBA and its ELA alleged that the state shortchanged schools by renegeing on its Prop 98 obligations. This agreement ensures public schools will receive repayment of \$686 million (approximately \$110 per student) due to prior year underpayments. It also contains provisions that could protect up to 1 percent of the Prop 98 guarantee (\$756 million in 2017–18 and potentially more in future years) as part of the annual certification process.
- ▶ **Aggressively defended the interests of school districts and county offices of education on myriad legal issues. CSBA filed numerous amicus briefs and letters and participated in continuing lawsuits as a party to the litigation on wide-ranging and diverse issues of critical importance, including:**
  - › Addressing the California Supreme Court on the state's failure to fulfill its obligation to provide reimbursement for programs it imposes on school districts (*CSBA v. State of California*).
  - › Contesting the State Board of Education's ability to approve a charter petition that is materially different from the petition denied by a school district (*CSBA/ELA and San Jose USD v. State Board of Education [Promise Academy]*).
  - › Confirming that school districts can assess developer fees for new school facilities on developments restricted to housing adults only (*Salinas Union High School District v. Tanimura & Antle Fresh Food, Inc.*).


- ▶ Ensuring schools can create and maintain safe and non-disruptive learning environments on their campuses, including using “disruptive parent letters” if necessary (*Camfield v. Redondo Beach Unified School District*).

- ▶ **Pursued 15 matters in which CSBA and its ELA filed amicus briefs and letters in support of school districts and county offices of education.** The cases address California Public Records Act requests and the financial burden on public agencies to redact such records; funding school facilities through developer fees; providing a free appropriate public education (FAPE) to students; school districts’ ability to use “disruptive parent letters” when necessary; proper application of the Government Tort Claims Act to limit school district liability and litigation costs; Deferred Action for Childhood Arrivals; and school districts’ ability to appropriately deny a charter school renewal petition.





- ▶ **Launched a new GAMUT platform that integrates applications for GAMUT Meetings, GAMUT Policy and GAMUT Policy *Plus*.** The new GAMUT platform programs replace the retired Agenda Online, GAMUT Online and Manual Maintenance platforms.
- ▶ **Released five district and two county office of education policy update packets** that included revisions to a total of 130 polices, regulations, bylaws and exhibits.
- ▶ **Created 12 new policies, including:**
  - › BP 0520.1 - Intervention for Underperforming Schools
  - › BP 0520.1 - Comprehensive and Targeted Support and Improvement
  - › BP 4119.24 - Maintaining Appropriate Adult–Student Interactions
  - › BP 5131.8 - Mobile Communication Devices
- ▶ **Facilitated Policy Development Workshops for 42** school districts and county offices of education and doubled the number of consortium workshops that focus on providing resources to small school districts.

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- ▶ **Developed guidance documents to assist districts undergoing Federal Program Monitoring review** as they pinpoint the evidence needed to satisfy CDE requirements.
  - ▶ **Processed more than 4,800 policy update** requests from Manual Maintenance subscribers.
  - ▶ **Assisted 68 districts and county offices of education in the updating** and overhauling of their policy manuals.
  - ▶ **Performed more than a dozen comprehensive Policy Manual Reviews** (policy audits) for school districts throughout California.