

# 2014 Year in Review



## 2014: A stronger and more engaged CSBA

Looking back at 2014, I am awed and inspired by the profound success and progress CSBA has made to broaden our influence at the state level and engage the membership. Our successes over the last year were rooted in the commitment of CSBA's Board of Directors to support the Association's membership, and our employees' determination to go above and beyond their calls of duty to respond to changes in the education landscape.

2014 got off to a powerful start, with CSBA and ACSA's joint advocacy effort that drew 200 governance teams to the January State Board of Education (SBE) meeting to advocate for local flexibility to be maintained in LCFF regulations. This effort was incredibly successful and resulted in the approval of favorable regulations by the SBE. CSBA's LCFF advocacy efforts were complemented by our series of LCFF workshops, which were held in 10 cities across the state and offered free to our members.

Taking LCFF support a step further, CSBA partnered with California Forward to establish the LCFF Collaborative Working Group, comprised of superintendent and governing board member teams from 17 districts and county offices from across the state. Through the work of the Collaborative, CSBA will continue to help districts address LCFF and LCAP challenges, identify best practices and advocate for strategies that strengthen the long-term viability of the LCFF for all education agencies.

Connecting with and supporting the membership was a hallmark of 2014 that reached a crescendo at the 2014 Annual Education Conference (AEC) with our iCount member census. The iCount census and opinion survey project focuses on engaging you – the membership – by recognizing the individual characteristics and networks of each CSBA member, in order to enhance our policy, advocacy, training and organizational planning efforts.

The iCount member census is now being distributed electronically to members who have not yet had the opportunity

to complete it, with the member opinion survey following later in 2015.

While CSBA spent a considerable amount of time supporting the membership with the implementation of the LCFF and LCAPs, our legislative efforts were focused on numerous high-profile and costly legislative proposals that stood in contrast to our principles and policy platform. One such proposal, a cap on school district budget reserve levels, required CSBA to aggressively advocate for repeal of the reserve cap statutory language, which is tied to the recently-passed Proposition 2. Our efforts have produced marked results; the Governor has recognized the issue in his 2015-16 Budget proposal, and has committed to engage in dialogue with stakeholders.

California voters spoke loudly in November when they passed Proposition 2, as they did with Proposition 1, a water bond which passed overwhelmingly in light of the state's major ongoing drought. That was bad news for AB 2235, a school bond measure that did not make it to voters, over concerns of two bond measures on the same ballot. I maintain that there are two droughts in California: water, and school facilities. We can't make it rain, but we will continue to push for a facilities bond.

The facilities push bond ultimately leads back to our ongoing conversation about funding adequacy, spearheaded by the Robles-Wong lawsuit, challenging California's education

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## 2014 Highlights and Photos

Advocacy, 2

Education Legal Alliance, 3

Policy | Member Services, Training and Education, 4

Communications | CA School Boards Foundation, 5

## Advocacy

- In 2014, CSBA actively lobbied XX bills, achieving more than \$XX million in savings for districts and county offices of education.
- Advocated prioritizing additional investments in the Local Control Funding Formula, deferral elimination and mandate claim payments:
  - » \$4.75 billion in ongoing funding was budgeted for LCFF grants in the 2014-15 budget, moving districts one-third of the way toward full implementation; county offices of education were fully funded in the 2014-15 budget.
  - » \$5.1 billion in additional apportionment deferral buy-down was budgeted, leaving only \$900 million in deferrals remaining; all deferrals should be fully eliminated in 2015-16.
  - » \$400 million was allocated on a per-ADA basis for mandate claims; about \$65 per ADA.
- Led an aggressive media and legislative campaign to repeal the reserve cap language that was adopted as part of the education budget trailer bill, SB 858, in June 2014.
- Authored a Report on School District Reserves in December, outlining the impact of SB 858 on local school districts.
- In partnership with ACSA, CSBA coordinated State Board of Education testimony in January and July on LCFF regulations and the LCAP template. More than 250 school board members, superintendents and other school administrators testified.
- Co-sponsored SB 971 (Huff, R-Diamond Bar), which was signed into law, to repeal and amend hundreds of sections of the Education Code as a result of enactment of LCFF.
- Worked in concert with a number of individual school districts on a new definition for eligibility for free and reduced-priced meals by linking it to the definition of federal income eligibility criteria. This was critical to making it easier to determine eligibility for supplemental and concentration funding grants under LCFF.

**SB 858 got it wrong**  
Why the SB 858 reserve cap will put school districts in financial jeopardy

**Under SB 858**, if \$1 is contributed to the State's Rainy Day Fund then districts must **spend** down reserves

**SAFE**  
30%  
30% or 4 months of expenses = average reserve level\*

**VULNERABLE**  
6%  
New reserve cap is barely enough to cover 6-9 DAYS of payroll

**Why should districts have healthy reserves?**

- To mitigate budget surprises
- To save for specific projects (like textbooks, computer hardware, deferred maintenance and bus purchases.)
- Because it's key to district solvency! \*\*

**What is the community saying about SB 858?**

"So if it's good for the state to have big reserves, why isn't it good for local community college to have big reserves? Just doesn't make much sense..."  
Source: Dan Walkers in the Sacramento Bee

"Had we been living at a 6 percent maximum, we would not have survived the last few years..." Chief Business Official Julie Benschert told Modesto City Schools board members in 2010. Source: Modesto Bee

**CSBA urges repeal** of the SB 858 reserve cap to ensure that school districts can be financially prepared for economic uncertainties so they can best serve their students and communities.

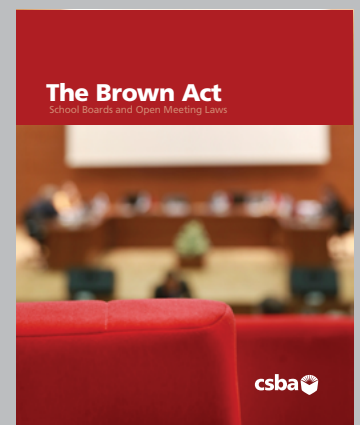
\* Solvability average reserve level per CTA Advocacy material on SB 858  
\*\* The Fiscal Crisis and Management Assistance Team found that the "failure to maintain reserves" is a key condition that has been found most frequently to indicate a school agency is in fiscal distress.

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Above: CSBA President Josephine Lucey speaks at an Aug. 18 press conference in support of Assembly Bill 146 to repeal the reserve cap.

Left: Award-winning CSBA infographic that outlines the case on how SB 858 got it wrong and why the reserve cap needs to be repealed.



Above: Hot off the press is CSBA's "The Brown Act: School Boards and Open Meeting Laws" that debuted at AEC 2014.

- Engaged key stakeholders and legislators on suspension and expulsion issues leading up to the passage of AB 420 (Dickinson, D-Sacramento). This legislation addresses and redefines which groups of students can be suspended or expelled for willful defiance.
- Supported changes to the federal E-Rate program by the Federal Communications Commission, including a \$2 billion increase in funding for the program and an additional \$3 billion from redirecting expenditures from outdated services, such as pagers.
- Held briefings in Washington D.C. for Congressional staff on key education issues.

## Education Legal Alliance

- Handled more than 125 legal inquiries and filed five amicus briefs in 2014.
- Successfully supported a school district's decision not to release scores attributed to teachers by name that measure a teacher's effect on his or her students' performance on standardized tests to the press.

- Initiated a \$1 billion test claim before the Commission on State Mandates to recover the technology, equipment, internet and training costs incurred by districts implementing Smarter Balanced Assessments.
- Produced Education Insights: Legal Update webcast series to provide members with in-depth information on key educational issues, including the Brown Act, collective bargaining and LCFF, tenure, seniority and teacher dismissal, and Form 700.
- Successfully supported a school district in establishing broad jurisdiction for the Education Audit Appeals Panel. The Panel presents a less expensive and more efficient forum to challenge adverse audit findings that may affect the fiscal affairs and reputation of a district or county office of education.
- Coordinated the legal support of CSBA's reform legislation on teacher dismissals.
- Continued to pursue challenges to the statewide school finance system through the Robles-Wong v. California lawsuit, and to the approval procedures for statewide benefit charters. These cases are currently on appeal.



Above: Legal experts addressing the LCFF and collective bargaining in CSBA's Education Insights: Legal Update webcast in October.

Right: CSBA's Policy & Programs department published nearly 30 fact sheets, blog posts, white papers and governance and research briefs on important education policy issues.

**Physical Education**  
A Fact Sheet for California's Elementary School Districts

**Ornance Perspective**  
with School Board Members from Need Learning Initiative School Districts

**Governance Brief**  
English Learners in Focus, Issue 1  
Developing an Implementation Model of California's English Learner

**Figure 1: Ethnicity of California's K-12 students 2012-13**

Ethnicity	Percentage
Hispanic/Latino	24%
White	23%
Asian	9%
Black	8%
Other	36%

**Figure 2: Linguistic diversity**

With regard to language, by 2012-13 almost two fourths (72%) of 1,980,129 of CA's K-12 students were identified as English Learners. An additional 22% were identified as students whose primary language is not English but who have met the district criteria for identification as students in English. This means that 64% of the state's students live in households where the language spoken at home is not English. That is, 64% of the state's students live in households where the language spoken at home is not English. This has important implications for districts, not only with regard to state and federal programs but also to their own and include Accountability Plans (APAs) as required under the Local Control Funding Formula (LCFF).

California's level of linguistic diversity has remained relatively steady for the last decade. While the overall student population has fluctuated slightly by district, the overall state population has fluctuated slightly by district.

## Policy

- Published nearly 30 fact sheets, blog posts, white papers, and governance and research briefs on important policy issues such as English Learners, a Synthesis of Research on Governance, Healthy Relationships for Adolescents, Cyberbullying, Reducing Out-of-School Suspensions and Expulsions, Two-Way Immersion programs and Common Core Options for High School Math.
- Developed a county board and school district one-pager that outlines the role and responsibilities of board members.
- Enhanced CSBA's online LCFF toolkit, which guides governance teams through the LCAP development process and provides information and resources for boards about the LCFF.
- Represented the interests of governing board members on various state-level committees addressing student discipline, English Language Learners, summer learning, Common Core State Standards implementation and school administrator certification.

## Member Services, Training and Education

- The 2014 Annual Education Conference and Trade Show was attended by more than 3,000 school governance team leaders.
- Strengthened membership by adding 14 new members, bringing CSBA's total membership to 972.
- Governance and Management Using Technology (GAMUT) services, an online policy information service that includes the complete CSBA Policy Update Reference Manual, provided to 875 members.
- Provided Manual Maintenance support, a subscription service that provides policy updates and services, to more than 470 districts and county offices of education.
- Produced 70 sample policies and three comprehensive issues of Policy News to provide members with resources and information supporting effective local governance.
- A special policy update was distributed in October with new sample policies supporting LCFF implementation.



Above: California Schools newsletter was updated to full-color, and both the newsletter and magazine are available in a new digital format.

Right: CSBA's Executive Committee welcomed Melba Pattillo Beals to the May 17 Delegate Assembly to honor the 60th anniversary of Brown v. Board of Education decision.



Below: CSBA CEO & Executive Director Vernon M. Billy talks with Khan Academy Founder Sal Khan on key education issues at AEC 2014.





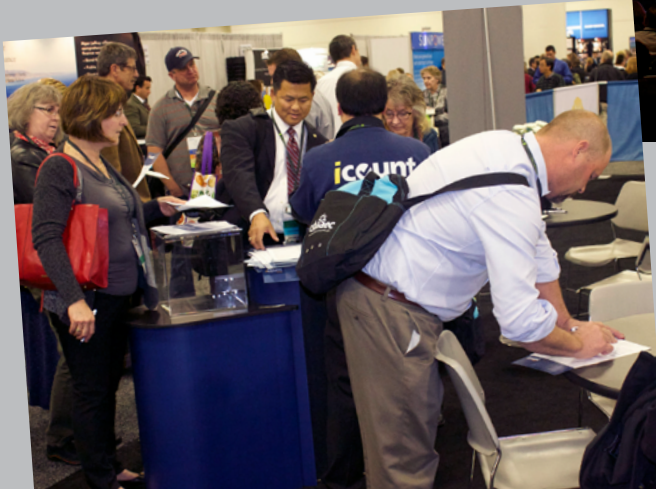
- Launched the new Agenda Online program on July 1.
- Provided 32 policy development and 44 governance consulting workshops to governing boards.
- CSBA and CA Forward introduced the LCFF Collaborative, a working group of 17 school districts and county offices of education to identify and promote promising LCFF and LCAP implementation strategies, solutions and best practices.
- Conducted a 10-city LCFF tour with CA Forward to assist governing school boards and local education agencies in the effective implementation of the LCFF and development of LCAP plans.
- Launched a partnership with McPherson & Jacobson to create an executive search service for California's school districts and county offices of education.
- Members participated in a number of online learning opportunities, including the Forecast webcast, Education Insights: Legal Update series and Back-to-School webcast that provides updates and information on current education trends and issues.

## Communications

- Increased CSBA's media coverage, garnering nearly 950 articles.
- CSBA issued 28 press releases, op-eds, and statements.
- Managed more than 200 media inquiries.
- Enhanced CSBA's presence on social media by increasing activity on Twitter, Facebook, LinkedIn and blogs.
- The CSBA monthly newsletter was revamped with an updated full-color format and online availability. California Schools magazine is now offered online in a new digital format as well.
- CSBA's website had nearly 650,000 page views.

## CA School Boards Foundation

- Utilized nearly \$600,000 in grant funding in FY 2013-14 to develop 67 publications, including videos, web presentations, articles, briefs and white papers, 40 AEC sessions serving 760 members, and more than 230 district-adopted policies on issues ranging from summer learning, health and nutrition, and Linked Learning.



*Top left: President Josephine Lucey addresses CSBA's Delegate Assembly on May 17.*

*Left: CSBA members filling out iCount forms during 2014 AEC.*

*Above: Dr. Freeman Hrabowski during his keynote address at the first AEC General Session on Dec. 14.*



- Program revenues | **46%**
- Membership dues | **42%**
- Other | **12%**



- Salaries and benefits | **65%**
- Other | **35%**

## Looking back at 2014

*Continued from page 1*

funding system. The case is currently awaiting oral arguments, and the Education Legal Alliance (ELA) has worked extensively throughout 2014 to move the case toward its day in court. Our Governmental Relations team is supporting that effort in 2015 by aggressively pursuing formal hearings with the Legislature on the issue of adequacy.

On another funding adequacy issue, in 2014 the ELA facilitated and funded a test claim with five LEA's on the Smarter Balanced Assessment (SBA) – a test which concluded that the total estimated funds the state would need to provide for all LEA's to comply with the SBA mandate is in excess of \$1 billion annually. The ELA also hosted a webinar on "Demystifying Form 700," which continues to receive several online views, and a webcast on collective bargaining in LCFF.

Our Member Services team also had a busy 2014, highlighted by more than 30 policy briefs and factsheets produced for our members, including the expansive "Report on

School District Reserves" which was presented at a news conference in December and delivered to the Legislature. The team also conducted more than 50 in-district governance training sessions for members throughout the year, on such topics as effective governance and leadership, superintendent evaluation board self-evaluation.

2014 was a year of transition for California schools, which presented the opportunity for CSBA Directors, members and staff to respond with strength and resolve. We accomplished a great deal, and those accomplishments will carry us into the year ahead – but there is still much more to come. I am excited for the opportunities that 2015 will present, and to see CSBA continue to shine.

Sincerely,



**Vernon M. Billy**, CEO & Executive Director

Josephine Lucey, *President*

Jesús Holguín, *President-elect*

Chris Ungar, *Vice President*

Cindy Marks, *Immediate Past President*

Vernon M. Billy, *CEO & Executive Director*

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