REVISED LEADERSHIP ASSEMBLY AGENDA (agenda is in order of items presented)

Student Performance by Northwood High School

1.0 CALL TO ORDER
1.1 Welcome
1.2 Procedures governing the operation of the Assembly will be reviewed by President Linda Kaminski. Past President Holly Edds will serve as Parliamentarian. Sturgis Standards Code of Parliamentary Procedure is the authority for parliamentary procedures.
1.3 Introduction of Delegates
Region Presidents will introduce their delegation. Committees/Councils will introduce themselves.
1.4 ACSA’s Mission
1.5 Adoption of the Agenda

2.0 CONSENT ITEMS
2.1 Approval of Minutes – May 9, 2019

3.0 ACTION ITEMS
3.1 2020 Nominating Committee Report and Nominations from the Floor

4.0 PRESENTATIONS/DISCUSSION ITEMS
4.1 Second Year Focus on Strategic Plan Presented by Wes Smith
4.2 Strategic Plan Region ShareShop
4.3 Obligations of Form 700
4.4 Equity Presentation – Cultural Differences and Classroom Implications
4.4A New Item: Census 2020 – Alex Padilla, Secretary of State

4.5 End of Session Legislative Update
4.6 Overview of ACSA’s Professional Development Survey Results
4.7 IgnitEd NASS Conference Update
4.8 Overview of Learning Policy Institute’s Research California’s Positive Outliers
4.9 ACSA 2019 Leadership Summit Update, November 7-9, 2019

4.10 Region Discussion Time
4.11 Report of the President

LUNCH 12:10-12:50 p.m.

5.0 INFORMATION ITEMS
5.1 Membership Report as of August 31, 2019
5.2 Financial Reports–For the Twelve Months Ending June 30, 2019 (unaudited statements)
Financial Reports for the Two Months Ending August 31, 2019

6.0 ADJOURNMENT – Please take the online Leadership Assembly Survey https://www.acsa.org/leadership-survey
the mission of acsa

The Association of California School Administrators is the driving force for an equitable, world-class education system, and the development and support of inspired educational leaders who meet the diverse needs of all California students.

An educational leader is someone who:

- Puts students first and advocates on their behalf
- Sees the potential in all individuals through the lens of equity and a belief in the power of diversity
- Draws upon the passion and talent of others to develop a shared vision for education
- Builds strong consensus and a commitment to action
- Is principled and authentic
- Is bold and influential
- Is driven to turn possibility into reality
- Inspires others by nourishing the mind and the heart
- Understands that it is a primary responsibility of leadership to cultivate and promote other leaders.
ASSOCIATION OF CALIFORNIA SCHOOL ADMINISTRATORS
Leadership Assembly
Thursday, May 9, 2019
Hilton Arden West, Sacramento, CA

MINUTES

1.0 CALL TO ORDER

1.1 President Holly Edds called the meeting to order at 8:18 a.m., Thursday, May 9, 2019. Performance by the Rosemont High School Drumline entertained delegates.

1.2 Review of Leadership Assembly Procedures
Procedures governing the operation of the Assembly were reviewed. Past President Lisa Gonzales served as Parliamentarian. Sturgis Standards Code of Parliamentary Procedures is the authority for parliamentary procedures.

1.3 ACSA Mission
Terri Rufert, VPLA, Region 11, read the ACSA Mission Statement.

1.4 Adoption of the Agenda
Motion by Joe Austin, Board Director, Region 18, second by Daryl Camp, Board Director at Large, Region 7, to adopt the agenda.

Motion carried.

2.0 CONSENT ITEMS

Motion by Lisa Ketchum, Board Director at Large, Region 8, second by Leonard Choi, President-Elect, Region 16, to approve the following consent items:

2.1 Minutes – February 21, 2019

Motion carried.
3.0 ACTION ITEMS

3.1 Election of the 2019-2029 Vice President and Vice President for Legislative Action
Vice President Candidate Charlie Hoffman, Region 1, and Vice President for Legislative Action candidates Dennis Cole, Region 17, and Barbara Martinez, Region 10, each gave a three-minute speech. A board of tellers composed of three region consultants, distributed and counted ballots.

Results of the election:

2019-2020 Vice President:
Charlie Hoffman, Superintendent
Shasta Trinity ROP, R-1

2019-2021 Vice President for Legislative Action
Barbara Martinez, Principal, Pacific Grove Adult School, R-10

Motion carried.

4.0 REPORTS/PRESENTATIONS

4.1 Overview of ACSA Member Survey Results
Tatia Davenport, Senior Director of MarCom, provided delegates with the initial results of the all member survey which is aimed at determining first-hand what ACSA members value and need from ACSA and how well members perceive the association is delivering on the benefits and programs ACSA offers. The survey was delivered in two parts. Part I focused on value and satisfaction and was delivered on April 5, 2019 and Part II focused on ACSA’s professional development offering and launched on April 29, 2019.

4.2 Update on the Year’s Progress by Executive Director Wes Smith
To be completed.

5.0 DISCUSSION ITEMS

5.1 ACSA Strategic Plan Second Year Focus
Delegates reviewed the status of the Strategic Plan adopted in July 2018. As we move into the second year of implementation, the leadership assembly discussed what regions might consider doing to support milestones that coordinate with region and charter goals and objectives. Region discussions will lay the foundation for leaders to facilitate conversations at upcoming planning retreats during the summer.

Members of Leadership Assembly discussed 18 Milestones that have been identified for Second-Year Focus [see plan pages 4-7 for details attached]:

During the session, regions responded to the following questions:

(1) What do Regions and Charters currently do that supports these Second-Year Focus Milestones?

(2) What could Regions and Charters do to further support these Milestones?

(3) How can Regions and Charters coordinate support for Second-Year Focus Milestones with their local goals and objectives?

6.0 REPORTS/PRESENTATIONS

6.1 Reimagining Behavioral Health for California’s Children and Families
Alex Briscoe, California Children’s Trust, provided delegates with an Initiative to achieve health equity and healthy development for California’s children, youth and families. “Reimagining California’s Approach to Children’s Behavioral Health” is a framework for building solutions to increasing access to funding, mental health support, and the overall social and emotional crisis in the lives of children.

6.2 Disrupting Inequities: Cycle of Socialization
Marguerite Williams, ACSA Senior Director of Equity and Diversity, provided leaders a professional learning session on the cycle of socialization. A video depicting how the cycle of socialization has impacted students on various levels was shown and region table talks were organized.

6.3 Legislative Update
ACSA’s Governmental Relations team updated delegates on prevalent legislative issues currently facing school leaders to include expected items in the Governor’s May budget revision, overview of the most pressing bills currently moving through the legislature and status of some significant legislation.

6.4 2019 Leadership Summit – November 7-9, 2019, San Francisco
Daryl Camp, Chair of the Leadership Summit, provided an update on the Leadership Summit speakers and events that will take place at the upcoming Summit scheduled for November 7-9, 2019, at the Hyatt in San Francisco.

6.5 Report of the ACSA President
ACSA President, Holly Edds, thanked ACSA leaders and staff for their
overwhelming support and gracious hospitality as she travelled all over the state to regions and charters the like. It was truly a magical year and one that she will cherish for a lifetime.

7.0 DISCUSSION ITEMS

7.1 Debrief of the Day

8.0 INSTALLATION OF 2019-2020 ACSA PRESIDENT AND BOARD OF DIRECTORS

8.1 Installing officer, Azusa Board President, Xilonin Cruz Gonzalez, installed the 2019-2020, ACSA President, Linda Kaminski, and the Board of Directors.

9.0 INFORMATION ITEMS

9.1 Membership Report as of March 31, 2019
9.2 Financial Report – For the Nine Months Ending March 31, 2019
9.3 2019-2020 ACSA Governance Calendar

10.0 ADJOURNMENT

Motion by Sue Kaiser, Board Director, Region 15, second by Michael Payne, Delegate, Region 16, to adjourn the meeting 2:08 p.m.
2018-2021 ACSA STRATEGIC PLAN

Key Result Area: MEMBER DEVELOPMENT AND SUPPORT

Issue: LEADERSHIP DEVELOPMENT
Objective: Provide engaging, career-long leadership development opportunities for all members.

By 2021:
A. A strategy has been developed to identify and support personal and professional leadership development along a career pathway – from pre-certification through retirement.
B. Implementation of supports at each career stage is underway.
C. A focus on leadership skills (including advocacy/influence and equity) has been integrated into all professional development offerings.
D. A system is in place that leverages the collective expertise of members to support development of leadership in others.

Issue: PROFESSIONAL DEVELOPMENT – CONTENT
Objective: Ensure the content of ACSA professional development offerings remains relevant to changing member needs and professional issues.

By 2021:
E. A system is in place to regularly update the content of ACSA professional development offerings that includes input from members.
F. ACSA has expanded use of experts from the field to provide members just-in-time learning opportunities to address current and emerging issues and challenges.
G. ACSA partners with other education-focused organizations to meet member needs for learning in areas that supplement ACSA expertise.

Issue: PROFESSIONAL DEVELOPMENT – DELIVERY/REINFORCEMENT
Objective: Improve member access to convenient, ongoing development opportunities that reflect the latest trends in professional learning.

By 2021:
H. ACSA members have access to a wide range of delivery formats to learn in the manner and at the pace preferred.
I. ACSA has explored and tested strategies to reinforce learning and support members in applying and demonstrating knowledge acquired.
J. Members are recognized when they gain new competencies and reach new professional development milestones.

Issue: PROFESSIONAL PRACTICE RESOURCES
Objective: Make available easy-to-access resources addressing the latest research, tools and information pertinent to the role of the educational leader.

Adopted by ACSA Board of Directors 7/25/18
By 2021:

K. Members are accessing the online Resource Hub on a regular basis to help address daily professional challenges.
L. Content on the Resource Hub is increasingly member-directed and vetted to address the most critical needs.

Issue: MEMBER NETWORKING AND COLLABORATION
Objective: Build dynamic professional communities where members can learn and collaborate.

By 2021:

M. Multiple platforms exist to facilitate member networking and collaboration.

Issue: DISTRICT/COUNTY/SCHOOL SITE SUPPORT SERVICES
Objective: Better connect the value of ACSA to administrators at the site, county and district levels, tailoring ACSA services and engagement opportunities to the different needs and dynamics of each area as identified by state and local indicators.

By 2021:

N. Differentiated assistance has been developed to meet top needs based on state and local indicators.
O. Networking groups have been convened to support differentiated assistance.

Key Result Area: ADVOCACY AND INFLUENCE

Issue: ACSA IN A LEADERSHIP ROLE
Objective: ACSA is proactive in identifying and engaging stakeholders around current and emerging educational issues.

By 2021:

P. ACSA is leading a collaborative effort to increase school funding in California.
Q. ACSA is recognized as the preferred source of information on future trends in education.
R. ACSA has built and nurtured partnerships, including appropriate non-education related partners, to address issues that impact student learning, in and outside of the classroom.

Issue: GRASSROOTS ADVOCACY AND INFLUENCE
Objective: Amplify the voice of the profession at the local, state and federal levels by fully leveraging the influence of educational leaders.

By 2021:

S. Each region and charter understands the importance of and is fully engaged in local advocacy efforts.
T. ACSA members are empowered to organize education stakeholders through ongoing training, tools and support.

Adopted by ACSA Board of Directors 7/25/18
U. State, regions and charters have developed and are implementing year-round strategies for communication and engagement of elected officials and community stakeholders.

Issue: MEDIA RELATIONS
Objective: Raise ACSA’s reputation as the authority on education issues and as an influential spokesperson at the local, state and federal levels.

By 2021:
V. An annual process is in place to identify priority issues and related key messages that all leaders and members throughout the state are communicating effectively.
W. Spokespersons have been identified in each region (starting with the VPLAs) and training is being provided on a regular basis to support effective media relations and communication of key messages.

Key Result Area:
ACSA ORGANIZATIONAL DEVELOPMENT AND SUSTAINABILITY

Issue: ORGANIZATIONAL ALIGNMENT AND ACCOUNTABILITY
Objective: Tap the full potential of ACSA to effect positive change for the profession and for students through better alignment of roles, goals and resources at all levels of the Association.

By 2021:
X. The ACSA brand and culture is consistently reflected at the state, region and charter levels ("We are ACSA").
Y. A process is in place to identify on a regular basis shared state, region and charter goals, complementary roles in achieving them and a system for reporting and accountability.
Z. Clear roles, expectations, operating guidelines and suggested practices are in place for regions and charters.
AA. Committees and councils are supporting implementation of priorities in the Strategic Plan within their area of expertise.
BB. ACSA regularly evaluates major programs, progress on goals and priorities, and overall organizational effectiveness and efficiency.

Issue: MEMBER OUTREACH AND ENGAGEMENT
Objective: Provide members with a wide range of meaningful opportunities to contribute their diverse talent, experience and perspective to further the mission, goals and priorities of ACSA.

By 2021:
CC. Recommended approaches for engaging new, existing and retired members are developed and updated regularly with input from regions.
DD. Volunteer leadership roles are evaluated to ensure that substantive, rewarding opportunities are available at a range of commitment levels and modes of participation.

EE. Organizational barriers to expanded member engagement have been identified and removed.

FF. The development of ACSA service bundles/menu options and related fee structures have been explored to deepen member participation in the benefits of membership.

**Issue: MEMBER COMMUNICATION**

Objective: Raise member awareness of ACSA benefits, services and initiatives, and the overall value of ACSA membership and engagement.

**By 2021:**

GG. An evaluation has been conducted to determine what is most important for ACSA to communicate through different channels and vehicles, and to different target audiences.

HH. ACSA continues to leverage technology to better inform and engage members across the state, and to customize information members receive.

II. A more comprehensive member database is being developed to better target member interests and preferences for communication.

**Issue: SUSTAINABILITY**

Objective: Sustain and grow ACSA’s human and financial resources to support evolving goals and priorities.

**By 2021:**

JJ. Implement an ongoing cycle to evaluate and update the financial plan and to ensure uninterrupted delivery of ACSA services through a downturn.

KK. The ACSA service/professional development model has evolved to ensure long-term reliability and responsiveness to member needs.
LEADERSHIP ASSEMBLY

TO: Members of the Leadership Assembly

SUBJECT: 2020 Nominating Committee Report and Nominations From The Floor

ACSA Bylaws, Article IV, Leadership Assembly state:

4.043 Report of the Nominating Committee. The Nominating Committee shall publish its report in the preliminary agenda of the first leadership assembly meeting of the fiscal year. The Nominating Committee shall not nominate any of its members for any office.

4.044 Additional Nominations. Additional nominations may be made from the floor only at the first leadership assembly of the fiscal year provided prior consent has been obtained from the nominee and provided further that seven voting delegates, each from a different region, concur. A written list of the seven concurring delegates shall be presented to the ACSA President prior to the nomination from the floor. Assuming continuing eligibility to serve, no nominations for President or President-Elect will be accepted from the floor.

(Revised May 2016 DA)

During the months of July and August, correspondence was sent to ACSA leadership asking for suggested nominees for the offices of vice president. In addition, articles were placed in EDCAL asking for suggested nominees. The deadline for receipt of nomination forms was September 7, 2018.

On September 11, 2019, the 2020 Nominating Committee, composed of representatives from even-numbered regions, and two members at large, held a conference call to accept the slate of candidates for the office of vice president.

The nomination forms, submitted by the Nominating Committee for vice president follow.
## 2020 Nominating Committee

<table>
<thead>
<tr>
<th>Chair</th>
<th>Region: 16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holly Edds, Past President</td>
<td>Frances Baez</td>
</tr>
<tr>
<td>Asst. Supt., Ed Services</td>
<td>Administrator of Instruction</td>
</tr>
<tr>
<td>Orcutt USD</td>
<td>LAUSD</td>
</tr>
<tr>
<td><a href="mailto:hedds@orcutt-schools.net">hedds@orcutt-schools.net</a></td>
<td><a href="mailto:Frances.baez@lausd.net">Frances.baez@lausd.net</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region: 2</th>
<th>Region: 18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stephanie Groat</td>
<td>Kim Phifer</td>
</tr>
<tr>
<td>Coordinator</td>
<td>Asst. Supt., Human Resources</td>
</tr>
<tr>
<td>Eureka Union</td>
<td>South Bay USD</td>
</tr>
<tr>
<td><a href="mailto:sgroat@eurekausd.org">sgroat@eurekausd.org</a></td>
<td><a href="mailto:kphifer@sbusd.org">kphifer@sbusd.org</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region: 4</th>
<th>At Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lisette Estrella-Henderson</td>
<td>Rebecca Summers</td>
</tr>
<tr>
<td>Superintendent</td>
<td>Director, Curriculum &amp; Instruction</td>
</tr>
<tr>
<td>Solano COE</td>
<td>Glendora USD</td>
</tr>
<tr>
<td><a href="mailto:lehenderson@solanocoe.net">lehenderson@solanocoe.net</a></td>
<td><a href="mailto:rsummers@glendora.k12.ca.us">rsummers@glendora.k12.ca.us</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region: 6</th>
<th>At Large</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sonja Neely-Johnson</td>
<td>Mary McNeil, Ph.D.</td>
</tr>
<tr>
<td>Director, Special Education</td>
<td>Superintendent</td>
</tr>
<tr>
<td>West Contra Costa USD</td>
<td>Needles USD</td>
</tr>
<tr>
<td><a href="mailto:Sneely-johnson@wccusd.net">Sneely-johnson@wccusd.net</a></td>
<td><a href="mailto:Mary_mcneil@needlesusd.org">Mary_mcneil@needlesusd.org</a></td>
</tr>
</tbody>
</table>

| Region: 8        | ACSA Staff Liaison: |
|------------------| Suzanne Caffrey     |
| Joann Vaars      | 916.329.3804        |
| Coordinator      | scaffrey@acsa.org   |
| Santa Clara COE  |                      |
| jvaars@sccoe.org |                      |

<table>
<thead>
<tr>
<th>Region: 10</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Colleen Myers</td>
<td></td>
</tr>
<tr>
<td>Director, Curriculum &amp; Instruction</td>
<td></td>
</tr>
<tr>
<td>San Benito COE</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:cmyers@sboe.org">cmyers@sboe.org</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region: 12</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Michelle Wavering</td>
<td></td>
</tr>
<tr>
<td>Principal</td>
<td></td>
</tr>
<tr>
<td>Upland USD</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:Michelle_wavering@upland.k12.ca.us">Michelle_wavering@upland.k12.ca.us</a></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Region: 14</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Victor Thompson</td>
<td></td>
</tr>
<tr>
<td>Director, Student Support</td>
<td></td>
</tr>
<tr>
<td>LACOE</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:Thompson_victor@lacoe.edu">Thompson_victor@lacoe.edu</a></td>
<td></td>
</tr>
</tbody>
</table>
Office of:
Vice President

Joe Austin
2019 ACSA Officer Nomination

Nominee: Joe Austin

Region 18 State Board Representative
Poway Unified
13626 Twin Peaks Rd.
Poway 92064
858-668-4031
jaustin@powayusd.com

Region: 18

Nominated for: Vice President

Experience in educational administration and/or support services:
I have over 25 years of experience in education, over half of that time as an elementary and a high school principal, and just over two years of experience supporting and promoting the development of STEM instruction throughout Poway Unified School District as a Career Education Specialist. During the past 12 months, I’ve also served on ACSA’s Mental Wellness Task Force, and become a member of the Advisory Committee for the State’s Pilot for MTSS.

ACSA activities:
Secondary Ed Committee (2008-09), Region 18 VPLA (2009-12), Leadership Summit Planning Committee (2012), ACSA Superintendent’s Academy (2013-14), Region 18 President (2014-16), Board Rep for Co-Administrator (Current)

Other professional education organization activities and leadership roles:
City Heights Partnership for Children (2014-17)
Association of Poway School Managers (APSM): (2018-Present), Legislative Representative, Executive Committee

Other pertinent data:
Rotary International, Club 33: (2004-Present), STEM Committee, Scholarship Committee, Club Interact, Rotary Outbound Committee, Rotarians at Work co-chair, Camp Enterprise Facilitator
YMCA Adventure Guides (2012-Present)
Solana Beach Little League: Coach (2018-Present)

Other important information:
I signed up to join ACSA in 1999 during the first class session of my Administrative Credential program at San Diego State. As my administrative experience grew, so did my involvement in Region 18, beginning with Council and Committee work, then regional VPLA, and more recently, Regional President and Board Representative. It would be a distinct honor to serve as State
President of the organization that's taught me so much, and provided so many opportunities me to grow professionally.

Nominated by:
Individual Member
18/Joe Austin

Candidate has agreed to this submission: Joe Austin

Nomination submitted by:
Joe Austin
jaustin@powayusd.com
619.581.9644
2019 ACSA Officer Nomination

Nominee: Jonathon W Brunson

Assistant Superintendent of Human Relations
Milpitas Unified School District
1331 E. Calaveras Blvd.
Milpitas 95035
(408) 635-2600 ext. 6070
jbrunson@musd.org

Region: 8

Nominated for: Vice President

Experience in educational administration and/or support services:
Hello, my name is Jonathon Brunson, and I am humbly running for the position of Vice President for the Association of California School Administrators’ State Board. Like many of you, I am always looking for new challenges and opportunities to help with my professional growth in educational leadership. I am currently serving as the Assistant Superintendent of Human Relations in the Milpitas Unified School District. Before coming to Milpitas in 2018, I held leadership positions as the Assistant Superintendent of Human Resources in Yuba City USD (Years 2017-2018); the Director of Human Resources in the Davis JUSD (Years 2014-2017); principal of Douglass Middle School in the Woodland JUSD (Years 2005-2014); and Assistant Principal at Winter High School (Years 1998-2005). Prior to that, I started my educational journey as a teacher at Yuba City and Davis High Schools in the areas of social sciences and student activities.

The Mission Statement for ACSA demonstrates how we as leaders shall focus our work for the benefit of all students. What a beautiful testament regarding the level of supports and services that are available for our leaders throughout California and for the over 6.3 million students we serve. After years of service leadership to education and ACSA, I came to the decision that the time is right to run for VP on the State Board. So why now? Together, we can close the opportunity gap; together, we will ensure all policies and funding to meet the needs of our students; and together, we will grow in leadership to ensure we lead the nation in education. And besides, who wouldn’t want to be a part of the ACSA experience!

Throughout my 23 years in administration, I have been very involved in ACSA as you will see later in my application. My number one priority in service leadership is building and maintaining positive relationships between all stakeholders so we can motivate and inspire our youth. What we do locally and across the state matters. For me, leadership has always been about serving others in the field of education. I am very confident that I can assume all of the responsibilities that come with that of the Vice President position on the State Board of ACSA. I am proactive and committed to getting what is needed to be done in a timely manner. I value the positive working relationships that come with the great work and service we provide in
ACSA. When we are faced with challenges, I try to assume positive intent for all situations, as well as listen and work together to create a plan of action.

As an instructional leader and now as Assistant Superintendent, I have hired hundreds of employees (classified, certificated, and administrators) as well as helped others find a better fit for themselves in and out of education. Our priority in education is to ensure that all of our students have the very best services and highly qualified adults all around them in order to ensure their safety and that ALL of our students will have a truly rich and extraordinary educational experience. I will support the ACSA Board and our ACSA staff by basing all of our decisions on the Mission and Strategic Goals for ACSA.

Excellence by Design is not just a motto, it's what all decisions should be based on. I have worked positively alongside hundreds of employees across five districts over the years and the three regions of ACSA. Let me end by asking a question we should all be asking ourselves in the field of education, “what are you passionate about?” I am very passionate about serving others and maximizing their growth and mine in all aspects of education in order to build our capacity so we can finally close the opportunity gap. There is no problem we cannot solve together. I enjoy discovering new ways to look at our challenges and to ask questions such as, what are we doing to honor our past, what can we do to become great, and finally, how can we become EXEMPLARY?! I look forward to meeting with you to further express my goals for wanting to be the next Vice President on the ACSA State Board.

ACSA activities:
Here is the chronological order of my service to ACSA from the Charter and Region levels.

Region 3 Yolo Charter

Membership Chair
VP Leg. Action
President Elect
President
Past President

Region 3 (two year terms)

VP Leg Action
Pres. Elect.
President
Past President
Director on the State Board and voted to be on Executive Committee with the State Board

Region 2
I was asked to hold the office of Past President for Region 2 to support their team

Region 8
HR Council
I believe where ACSA has had its greatest impact on me and across the state was at the local/Charter level. It was at this level where my ACSA involvement started 23 years ago when I began my leadership journey as the assistant principal for Winters HS (WHS) in Yolo County, Yolo Charter of (Region 3). I was immediately involved in ACSA membership activities and supporting Every Student Succeeding (ESS) and Administrator of the Year (AOY) nomination process. Over the past 23 years, I have nominated dozens of students and leaders as a way to honor their work and commitment to education and for their perseverance. Both of these celebrations/recognitions gave our district the opportunity to be involved at the local level to honor their work in their education and educational leadership. ESS kept me focused on our students who don’t have a voice and deserve to be recognized for the resiliency from life’s challenges. They had to overcome the many obstacles in their lives while attaining their education. I encouraged my staff and leaders across Region 3, 2, and now Region 8 to nominate our students for our local recognition and then submitting their names to the Charter for scholarships and hopefully have them recognized at the Region and State Level. I was my privilege to nominate the leaders from my former districts who made a difference in our schools and community for AOY. They were also responsible for mentoring me to become the leader I am today. It started 20 years ago with Emilie Simmons in Winters (Yolo Charter Region 3) who was our district’s Special Education and Alternative Ed Principal. She actually wore many more hats and her leadership had a profound impact on me as she was one of my mentors and continues to be my friend. So much so, when I became president of Region 3 eight years ago, I recruited Emilie to be our Region’s Consultant so her leadership could continue to inspire and support our leaders of today in the greater Sacramento/Yolo Counties. As you can see, because of ACSA there can be long-term relationships that never go away and foster the continuum of leadership and service to others.

As I grew in my leadership in education, I also made the commitment to grow in ACSA. I began at the Charter level (Yolo Charter Region 3) as the Membership Chair, then VP Leg Action, President Elect, President and Past President. I then went on to support ACSA and our members at the Region level in Region 3. I served as VP of Legislative Action, President Elect, President, Past President, and finally as a Director on the State Board. During those years I served on the Strategic Planning Team, the realignment of Leg. Action to recommend legislators for their elected state offices. While on the State Board I supported the creation of our Mission Statement for ACSA and was nominated to be on the Executive Committee with our State Board Leaders and ACSA Staff. I was honored to be considered for this highly confidential level of service for ACSA.

Because of my career advancement and moving to a new position in Region 2, the State Board bylaws would not allow me to finish year three of my three year term in Region 3. That didn’t stop my wanting to be involved in Region 2, where I was asked and accepted the needed role of Past President in order to support our new leaders in the region..

This year I am serving Region 8 as our representative on the Human Resources Council. So as you can see, wherever I go, ACSA will always be with me as it aligns with my view of service leadership.
I was asked to serve on the ACSA State Summit Planning Committee three times over the years to ensure we have the best conference in support of our leaders. Last year I was asked to be Co-Chair for the ACSA State Summit in San Diego. I have also been on the Regions 1, 2, 3, and 4 planning committee for the North State Conference for about 12 years before relocating to the Silicon Valley.

It has always been my passion to support our local leaders through ACSA. I think what I am most proud of in my ACSA leadership roles and responsibilities is the learning I have gained from my peers and even more exciting, is the manner of which I have encouraged and inspired others to believe in themselves to get involved in ACSA leadership activities.

I have been able to grow in our profession by attending two academies for my professional development through the Education Services Department in ACSA. I completed two academies, Human Resources and the Superintendents. I have attended many Negotiations Symposiums, Delegate Assemblies, State Summits, and HR Conferences as well a Leg Action Days.

I was very involved with Governmental Relations by interviewing candidates for endorsements from ACSA, Legislation Action Days, and supporting an endorsing local and state candidates as well as Propositions for our students.

I have supported and attended many of the Women’s Leadership Network, LGBTQ, CALSA and our Equity in Leadership events over the years. All of these organizations and conferences allow ACSA to be out in front of our students and leaders in order to demonstrate our unparalleled commitment to the diversity in leadership for our great state.

I served on the Strategic Planning Team six years ago representing Region 3.

**Other professional education organization activities and leadership roles:**
I have served on three WASC Accreditation Teams and Two Christian Schools International joint teams with WASC in order to support students, staff, families in their communities. I was always intrigued about the focus of the work to ensure a quality education for our students. In each of the school districts where I served as an administrator over the past 23 years in Winters, Davis, Woodland, Yuba City and now Milpitas, I have served on local committees, Budget Advisory, Curriculum and Instruction, LCAP, DELAC, Facilities Bonds, and the Concilio of Yolo County.

I was an Activities Director and Student Government teacher for two high schools during a five year span and worked for the California Association of Directors of Activities (CADA) as a Leadership Camp Team Member.

**Other pertinent data:**
I am a member of Kiwanis. I have served as a parent on our children’s School Site Council, their Pre-School Site Council, and as a Booster Parent for my daughter’s golf team and my son’s football team. I have served my church to support college students in mentoring as well as driving them to church on Sundays.
Other important information:

Ever present in our collective educational Leadership world is how we should be making decisions for our students. We have to remain committed to our moral imperative of closing the achievement/opportunity gap. As our Mission Statement for ACSA so eloquently points out, ACSA has a voice in education and we are committed as the driving force for an equitable, world-class education system, and the development and support of inspired educational leaders who meet the diverse needs of all California students. We need to be accountable; show it in our actions, analyze our effectiveness, check our attitudes while increasing our awareness to all of our leaders. If we can maintain an Equity Focus with everything we do, nothing will stop us from finally closing the opportunity gap for our students. We will do this through our Strategic Goals that focuses on Membership Development and Support, Advocacy and Influence, and Organizational Development and Sustainability. I promise that I will support our Mission and Strategic Goals for ACSA and we will always be vigilant and focused on how we serve our students and our leaders.

Committing to our students success and well-being is priority one, followed by our commitment to providing our leaders with the training and information needed to close the achievement/opportunity gap. There is so much work to do still in the areas of equity and funding for our schools so we as Californians can say, "there is a direct correlation to our funding in public education and it is directly connected to our beliefs and the work we do."

In serving as the Assistant Superintendent for Human Relations for Milpitas USD, it is our mission to recruit and retain the very best personnel for our students. One of our strategic goals is to build a Culture of We that engages parents, staff, and community partners in supporting student success and celebrating diversity. Research says that the number one indicator for closing the achievement/opportunity gap is to get the right person in front of our students. In order to do that, we have to have the right people in leadership who are committed to that imperative and to show the courage to do whatever it takes to make our students experience in education world class. California leads the way in embracing our diversity, creativity, innovation, technology, and ACSA will lead the way in preparing our leaders to put our students first in all of our decisions.

If I were to be selected for this honorable position in ACSA leadership, it will be my solemn commitment to ensure our students are given everything they need in order to realize their dreams. When you hear my life story, you will know about my humble beginnings, my genuine empathy and understanding for others and that I will do whatever it takes to support the beautiful diversity of our state so our students and leaders will be assured, anything is possible. Thank you for reading this message and your support over the years. Now let's continue the great work our leaders have so brilliantly put in place, and ignite the love of learning and leadership. That is the Mission of ACSA.

Nominated by:
Committee/Council
Region 8 Dawnel Sonntag thesonntags@sbcglobal.net

Candidate has agreed to this submission: Jonathon Brunson
Nomination submitted by:
Dawnel Sonntag
thesonntags@sbcglobal.net
(408) 460-2955
Office of:
Vice President

Dr. Erin Simon
2019 ACSA Officer Nomination

Nominee: Dr. Erin M. Simon

Director, Student Support Services
Long Beach Unified School District
1515 Hughes Way (Main District Office) / 2221 Argonne Ave (Dr. Simon's Office)
Long Beach 90810 (Main District Office) / 90815 (Dr. Simon's Office)
(562) 986-6870 x 241
esimon@lbschools.net

Region: 14

Nominated for: Vice President

Experience in educational administration and/or support services:
Dr. Erin M. Simon leads major reform efforts in school districts. In her current role as the director of student support services for the Long Beach Unified School District (LBUSD), Dr. Simon manages a $4.5 million budget and 22 staff members.

Dr. Simon leads the direction of the Family Resource Centers, which provide social, emotional and behavioral health-related support to students within a cluster of schools in LBUSD. She also provides guidance to the District’s 85 schools, with over 72,000 students, on specialized services that covers compliance, policy, and procedures such as, compulsory education laws, student records and discipline, academic credits, school placement, and mental health to name a few.

Dr. Simon’s career began as a high school teacher in Los Angeles, California. She then served as a high school dean of students in South Los Angeles, and a principal in Redondo Beach, California before becoming the director of student support services for the LBUSD in 2014. She has been recognized and praised for increasing student achievement, school attendance, and the closing of achievement gaps between identifiable groups of students.

Dr. Simon has focused her entire career around closing achievement gaps, educational equity, and community improvement. Her attendance efforts in decreasing elementary chronic absentee rates were highlighted in the California Attorney General, Kamala Harris' 2015 and 2016 annual reports, In School + On Track: California’s Elementary School Truancy & Absenteeism Crisis. In February 2016, Simon received the Long Beach City Prosecutor's Office IMPACT award for her successful efforts in reducing chronic truancy.

Dr. Simon graduated from San Jose State University with a bachelor’s degree in public relations. She holds a doctorate in educational leadership from California State University, Long Beach. She has received numerous awards for her contributions to policy and practice.

Long Beach Unified School District:
Director, Student Support Services
Family Resource Centers Coordinator
All In Campaign Coordinator
SARB Coordinator

Redondo Beach Unified School District:
Alternative Education Principal (Middle & High School) 2011 - 2014
Coordinator, School Attendance Review Board 2013 - 2014
Increased student achievement in reading, writing and mathematics on state standardized assessments by 71 points in the first year as principal and saw steady increases in all subsequent years as principal
Devised an “At-Risk Committee” to help empower and encourage ninth grade students who struggled in the areas of academics and attendance; dropout out rate from 9th to 10th grade rate decreased by 5 percent

Redondo Beach Unified School District:
High School Assistant Principal 2010 - 2011
Co-Middle School Principal March 2010 - August 2010
Middle School Assistant Principal 2007 - 2010

Los Angeles Unified School District:
Dean of Students 2005 - 2007
Special Education & Collaboration Teacher 2001 - 2006

ACSA activities:
Past President, Educational Options Council, Association of California School Administrators (ACSA), 2018 - Present
President-Elect, Educational Options Council, Association of California School Administrators (ACSA), 2015 -2016
Vice President of Membership, Association of California School Administrators (ACSA), Region 14, 2016-2017
President, Educational Options Council, Association of California School Administrators (ACSA), 2016 - 2018
During my second year as President, Educational Options Council, I spearheaded an Activity Design with the Council in partnership with ACSA to inform and educate ACSA Council members, legislators, and other statewide education stakeholders regarding the barriers alternative education students face (i.e., trauma, foster care, homelessness, immigration status, credit attainment, etc.). The Council equipped these key stakeholders with resources and tools that can ultimately help them prepare alternative students to be college and career ready. The Council had the distinct pleasure of meeting with the following legislators, statewide educators and Councils:

Dr. Shirley Weber, Assembly Member
Member of the Budget and Education Committees

Hon. Todd Gloria, Assembly Member
Member of Committee on the Status of Boys & Men of Color

Jennifer Johnson, Deputy Legislative Secretary
Office of Governor Jerry Brown

Teri Burns, Director of Policy and Legislation
State Board of Education

Lynn Lorber, Chief Consultant, Brandon Darnell, Principal Consultant
Senate Education Committee

Joshua Hoover, Capitol Director
Office of Assemblyman Kevin Kiley

(Vice Chair, Assembly Education Committee)

Councils

ACSA Middle Grades Education Council
ACSA Secondary Education Council
ACSA Career Technical Education Council
ACSA Elementary Education Council
ACSA Superintendency Council

As Past-President, the Activity Design continued during the 18-19 school year.

With the support of the ACSA Board of Directors, members of the Educational Options Council had productive meetings with a key legislator, legislative staff, the Department of Education, and statewide education groups. The meetings focused on potential legislative changes and collaboration opportunities for improving the educational experience of alternative education students. Specific topics included:

Interventions at comprehensive sites to prevent transfer to alternative education site
Timely transfer process that prevents missed educational time
Availability of robust educational programs and wrap-around services
Teacher and administrator placement
Targeted professional development opportunities
Collaboration opportunities aimed at educating key stakeholders

Legislative Meetings
1. Hon. Eduardo Garcia, Assemblymember, Chair of the Select Committee on the Status of Boys and Men of Color
2. Megan Baier, Education Policy Consultant, Office of Senate Pro Tempore, Toni Atkins
3. Misty P. Feusahrens, Special Assistant, Office of Assembly Speaker Anthony Rendon and Debbie Look, Principal Consultant, Assembly Education Committee
4. Julian Cuevas, Director of Government Affairs, Alejandro Espinoza, Legislative, Representative, California Department of Education
5. Elle Chen, Legislative Aide, Office of Assemblymember Wendy Carrillo, Chair of the Select Committee on Uplifting Girls and Women of Color in California
6. Michael Lucien, Legislative Director, Office of Assemblymember Reginald Byron Jones-Sawyer Sr., Chair of the Select Committee on Ending the School to Prison Pipeline
7. Ron Rapp, Director of Governmental Relations, California Federation of Teachers
8. Erika Hoffman, Legislative Advocate, California School Board Association

Conference Presentations

Co-Presenter at the Association of California School Administrators (ACSA) Leadership Summit - Second Chances Matter: Best Practices to Help All Students Succeed
Co-Presenter at the Association of California School Administrators (ACSA) Every Child Counts Symposium - If Our Compass Doesn’t Point to Kids: We Are Lost
Presenter at ACSA Northern California Conference - A Community-Based Approach to Improving Attendance

Other professional education organization activities and leadership roles:
Conference Presentations:

Co-Presenter at the My Brother’s Keeper (MBK) Alliance Regional Summit - Creating the Data Story: MBK Long Beach ESRI Story Map

ASCD Conference on Educational Leadership - A Community-Based Approach to Improving Student Attendance

Panel Member at the National School-Based Health Alliance Conference - Health and Chronic Absence: The Role of School-Based Health Clinics in Approving Attendance

Presenter at ASCD, California Department of Migrant Education Conference, United States Department of Education - Every Student, Every Day National Conference, California Association of Supervisors of Child Welfare and Attendance Conference, Campaign for Grade Level Reading National Conference - A Community-Based Approach to Improving Attendance

Presenter at the California State University, Office of the Chancellor’s Financial Aid Directors’ Meeting - Piecing it Together: Meaningful Collaboration Between School Districts and Universities

Co-Presenter at the Association of California School Administrators (ACSA) Leadership Summit - Second Chances Matter: Best Practices to Help All Students Succeed

Co-Presenter at the Association of California School Administrators (ACSA) Every Child Counts Symposium - If Our Compass Doesn’t Point to Kids: We Are Lost
Presenter at the California State University, Long Beach Education Symposium - The Relationship of Family Involvement and Family Structure on Children’s Academic Achievement

Panel Moderator at the California State University, Long Beach Education Symposium - Rising up to the Challenge: Changing Outcomes for Young Men of Color in P-16 and Beyond

Co-Presenter at the Council of the Great City Schools Fall Conference - Eliminating Barriers to Chronic Absenteeism: A Long Beach Unified School District Approach

Other pertinent data:
Community Affiliations (non-educational organization participation)

Community Board Member, St. Mary Medical Center City of Long Beach, 2016 - Present
My Brother’s Keeper (MBK) Advisory Council Member, City of Long Beach, 2016 - Present

AWARDS AND HONORS:

2017 Pioneer Spirit Award, Long Beach Stake of the Church of Jesus Christ of Latter-Day Saints
2016 IMPACT Award, Long Beach City Prosecutor’s Office
2014 Association for Supervisors and Curriculum Development (ASCD) Emerging Leader

Other important information:
Social Media Info

Linkedin - https://www.linkedin.com/in/erin-m-simon-ed-d-25397836/

Twitter handles - @LBUSDFRC, LBUSDALLIN, @Dispelthemyth

Nominated by:
Charter Group
ACSA Region 14: President: Sandra Skora

Candidate has agreed to this submission: Dr. Erin M. Simon

Nomination submitted by:
Sandra Skora
skora.sandy@tusd.org
(310) 533-4535, ext. 3880
Office of:
Vice President

Dr. Edward Trimis
2019 ACSA Officer Nomination

Nominee: Dr. Edward A. Trimis

Secondary Principal
Los Angeles Unified School District
5225 Tweedy Bl.
South Gate 90280
323-357-7531
etrimis@lausd.net

Region: 16

Nominated for: Vice President

Experience in educational administration and/or support services:
SUMMARY OF EXPERIENCE IN EDUCATIONAL ADMIN
Dr. Trimis has served for several different school communities in my career as teacher, assistant principal, principal, and district administrator including Berendo MS, Huntington Park, Polytechnic, Manual Arts, Verdugo Hills, and Legacy VAPA HS. Additionally, he has served at the district-level supporting schools and principals as an operations coordinator, grants specialist, and arts specialist. In each of his roles as a school-site administrator, Dr. Trimis has increased academic support leading to improved earning outcomes for all students, developed many new programs, both in the academic offerings including the arts, increased extracurricular and athletics programs, developed and implemented academies and magnets, and increased communication between school and the community including the use of social media and other innovative methods. Dr. Trimis’ work at the central and local district level includes work as a grants specialist (securing 80 million dollars in grants his first year) and as an operations coordinator supporting schools and principals in both operations concerns and issues. Dr. Trimis’ experience spans 36 years in Los Angeles Metro area.

ACSA activities:
Dr. Trimis served as the ACSA Region 16 State Board Rep from 2013-16. While on the State Board, he also served on the Secondary Education Council and Urban Education Committee. Trimis also served on Region 16 Executive Committee from 2013-16.

Other professional education organization activities and leadership roles:
Dr. Trimis served as president for the LAUSD Senior HS Principals Organization for three terms, and on district committees including the Principals Budget Advisory Group, Student Body Remedies Advisory Group. Past President of LAUSD Secondary Assistant Principals Organization and Vice-President of California Music Educators Association, Southern Section.

Other pertinent data:
Dr. Trimis served as president for the LAUSD Senior HS Principals Organization for three terms, and on district committees including the Principals Budget Advisory Group, Student Body
Remedies Advisory Group. Past President of LAUSD Secondary Assistant Principals Organization and Vice-President of California Music Educators Association, Southern Section.

Trinis presented workshops at several local and national conferences for Talent Development High Schools/Johns Hopkins University, Education Trust, Education Trust-West, National Association for Year Round Education, National Association for Music Education, California State University, Northridge, and California League of Middle Schools. His publications and awards include High School Principal of the Year (Association of California School Administrators, 2008), Outstanding Teacher Award (United Teachers Los Angeles, 1997), Outstanding Educator of the Year (Los Angeles County Music Educators Association, 1996), Bravo Award Finalist (Music Center of Los Angeles County, 1994). Trimis was interviewed and featured in/on LA Times, LA Daily News, San Fernando Valley Sun, United Teacher, Teaching Music, Foothill Leader, Glendale News Press, La Opinion, and various television and radio programs. He has had articles published in Leadership, Teaching Music (3), and Band World.

Other important information:
Dr. Trimis considers the achievement gap one of the most important civil rights issues of our time and has done extensive research in efforts to provide equity for all students. Dr. Trimis holds and earned EdD. from USC and his area of research is on closing the achievement gap. I believe that his experience in the past on the board and in schools and committee work has prepared me to be successful in the position of Vice President and appreciates your consideration. Full CV including portfolio items at www.visualcv.com/etrimis

Nominated by:
Individual Member
Dr. Victor Gonzalez (Region 16)

Candidate has agreed to this submission: Dr. Edward A. Trimis

Nomination submitted by:
Dr. Victor Gonzalez
ctor.gonzalez@lausd.net
213-241-3107, 626-817-2582
Executive Director, Wes Smith, will share this year’s strategic activities:

**Issue: LEADERSHIP DEVELOPMENT**  
Objective: Provide engaging, career-long leadership development opportunities for all members.

B. Implementation of supports at each career stage is underway.
C. A focus on leadership skills (including advocacy/influence and equity) has been integrated in into all professional development offerings.
D. A system is in place that leverages the collective expertise of members to support development of leadership in others.

**Issue: PROFESSIONAL DEVELOPMENT – CONTENT**  
Objective: Ensure the content of ACSA professional development offerings remains relevant to changing member needs and professional issues.

E. A system is in place to regularly update the content of ACSA professional development offerings that includes input from members.

**Issue: PROFESSIONAL DEVELOPMENT – DELIVERY/REINFORCEMENT**  
Objective: Improve member access to convenient, ongoing development opportunities that reflect the latest trends in professional learning.

I. ACSA has explored and tested strategies to reinforce learning and support members in applying and demonstrating knowledge acquired.
J. Members are recognized when they gain new competencies and reach new professional development milestones.

**Issue: PROFESSIONAL PRACTICE RESOURCES**  
Objective: Make available easy-to-access resources addressing the latest research, tools and information pertinent to the role of the educational leader.

K. Members are accessing the online Resource Hub on a regular basis to help address daily professional challenges.
L. Content on the Resource Hub is increasingly member-directed and vetted to address the most critical needs.

**Issue: DISTRICT/COUNTY/SCHOOL SITE SUPPORT SERVICES**
Objective: Better connect the value of ACSA to administrators at the site, county and district levels, tailoring ACSA services and engagement opportunities to the different needs and dynamics of each area as identified by state and local indicators.

N. Differentiated assistance has been developed to meet top needs based on state and local indicators.

Issue: ACSA IN A LEADERSHIP ROLE
Objective: ACSA is proactive in identifying and engaging stakeholders around current and emerging educational issues.

R. ACSA has built and nurtured partnerships, including appropriate non-education related partners, to address issues that impact student learning, in and outside of the classroom.

Issue: GRASSROOTS ADVOCACY AND INFLUENCE
Objective: Amplify the voice of the profession at the local, state and federal levels by fully leveraging the influence of educational leaders.

T. ACSA members are empowered to organize education stakeholders through ongoing training, tools and support.

U. State, regions and charters have developed and are implementing year-round strategies for communication and engagement of elected officials and community stakeholders.

Issue: MEDIA RELATIONS
Objective: Raise ACSA's reputation as the authority on education issues and as an influential spokesperson at the local, state and federal levels.

W. Spokespersons have been identified in each region (starting with the VPLAs) and training is being provided on a regular basis to support effective media relations and communication of key messages.

Issue: MEMBER OUTREACH AND ENGAGEMENT
Objective: Provide members with a wide range of meaningful opportunities to contribute their diverse talent, experience and perspective to further the mission, goals and priorities of ACSA.

EE. Organizational barriers to expanded member engagement have been identified and removed.

Issue: MEMBER COMMUNICATION
Objective: Raise member awareness of ACSA benefits, services and initiatives, and the overall value of ACSA membership and engagement.

GG. An evaluation has been conducted to determine what is most important for ACSA to communicate through different channels and vehicles, and to different target audiences.

HH. ACSA continues to leverage technology to better inform and engage members across the state, and to customize information members receive.

II. A more comprehensive member database is being developed to better target member interests and preferences for communication.
LEADERSHIP ASSEMBLY

TO: Members of the Leadership Assembly

SUBJECT: Strategic Plan Region Shareshop

In July we began the second year of implementing ACSA’s Strategic Plan, which was the culmination of intensive work and input from members from across the state. While a significant portion of the implementation work is taking place at the state level, stakeholders are working in close collaboration and coordination across all levels of the association to realize the aspirations envisioned by the plan. The work being conducted in Regions, Charters, and Committees/Councils is incredibly important to moving the association forward on many milestones.

In support of continued collaboration on key milestones, during the October 2019 Leadership Assembly, ACSA will host a conversation about Milestone EE, which appears in the Key Result Area of Organizational Development and Sustainability as follows:

Issue: MEMBER OUTREACH AND ENGAGEMENT

Objective: Provide members with a wide range of meaningful opportunities to contribute their diverse talent, experience and perspective to further the mission, goals and priorities of ACSA.

Milestone EE. Organizational barriers to expanded member engagement have been identified and removed.

Region 15 leaders will share how the Region has approached identifying and overcoming organizational barriers at the local level and what the Region is doing to expand member engagement.

During this interactive session, Regions will have an opportunity to discuss this milestone and respond to the following questions:

1. As you consider the objective of Milestone EE, what kind of member engagement would you like to see in your Region?

2. What organizational barriers to member engagement exist in your Region?

3. What could your Region do to overcome these barriers and enhance member engagement?

We look forward to your thoughts and to working together to make major strides in our second year of implementation.
LEADERSHIP ASSEMBLY

TO: Members of the Leadership Assembly
SUBJECT: Obligations of Form 700

Executive Director, Wes Smith, will discuss the Form 700 Advisory attached.
FORM 700 Reporting Information
ACSA Leadership Assembly and Board Meeting
October 16-18, 2019

**Wednesday, October 16**
Lunch $47.00
Dinner $47.00

**Thursday, October 17**
Breakfast $32.25
Lunch $47.00
Dinner TBD

**Friday, October 18**
Breakfast $43.00
Lunch $36.27

All food costs listed above include tax and hotel service charge.
Filing Form 700 Statement of Economic Interests:
An Overview for ACSA Board Members and Leadership Assembly Delegates

(Prepared with support from Atkinson, Andelson, Loya, Rudd & Romo)

The information below is intended to serve as a reference guide for new and current members of the Board of Directors and Leadership Assembly Delegates of the Association of California School Administrators ("ACSA"), with respect to their reporting obligations under California’s Political Reform Act of 1974 ("PRA;" Gov. Code § 81000 et seq.), as those obligations may be impacted by their involvement with ACSA. Specifically, while ACSA Board members and Delegates are subject to the PRA by virtue of their service as elected officials or employees of a local educational agency (and not by virtue of their service on the ACSA Board of Directors or Leadership Assembly) there are implications for Board members and Delegates related to their service on the ACSA Board and Assembly. Such Board members and Delegates may be required to report income and reimbursement received from their attendance at ACSA Board and Assembly meetings and conferences. Accordingly, the “general rules” set forth in the PRA are outlined below, followed by a more detailed explanation of the PRA and Form 700 filing requirements, as well as potential penalties for failure to properly file and resources for further assistance in complying with such obligations.

While ACSA is providing this general overview as a courtesy to its Board members and Delegates, ACSA is not serving as a legal advisor or legal counsel and cannot provide specific advice to individuals, so Board members and Delegates are encouraged to consult with their agency or legal counsel regarding any questions they may have regarding their specific reporting obligations. Additionally, Board members and Delegates should be aware that the application of the PRA is very fact-specific, so determinations regarding its requirements are dependent on the details of the particular situation. If you have specific questions, you should consult an attorney or the Fair Political Practices Commission ("FPPC").

I. **General Rules:**

- For 2019, no elected official/candidate, or “designated employee” of a local agency may accept any gift(s) from one source worth more than $500 in a single calendar year.
  
  - Payments or items of value (e.g., meals) will not be considered “gifts” if adequate consideration is provided in return, however the official carries the burden to establish adequate consideration was provided.

- Gifts of $50 or more, or aggregating $50 or more from a single source during the calendar year, must be reported on a Form 700 Statement of Economic Interests.

- Acceptance of gifts in excess of $500 during the previous 12-month period disqualifies an official from participating in decisions that will have a material financial effect on the source of the gift(s).
  
  - Note: This is based upon a “rolling” 12-month period measured from the decision involving the source of the gift.
II. **Conflict of Interest Codes**

The PRA is one of the two major sets of laws that govern conflicts of interest for public officials in California. In pertinent part, it states that “[n]o public official at any level of state or local government shall make, participate in making or in any way attempt to use his official position to influence a governmental decision in which he knows or has reason to know he has a financial interest.” (Gov. Code § 87100.)

To further this objective, among other measures, the PRA requires local government agencies to adopt a “Conflict of Interest Code” which governs the disclosure of various financial interests for public officials and employees of that agency. (Gov. Code § 87300.) For school districts and county offices of education, this is typically contained in Board Bylaw 9270. The individual agency’s Conflict of Interest Code sets forth the designated positions within the agency subject to its requirements, and what information should be reported by the individuals holding such positions. Additionally, Government Code Section 87200 requires certain specified officials and other “public officials who manage public investments” to disclose financial interests without having to be designated in the agency’s Conflict of Interest Code. As such, while these materials provide general information, ACSA Board Members and Delegates should consult their agency’s Conflict of Interest Code and their individual obligations pursuant to Government Code Section 87200 et seq. to determine their specific reporting obligations.

The FPPC, the agency that has primary responsibility for administering and enforcing the PRA, has developed a form upon which public officials and employees of a local government agency must make the financial interest disclosures required by statute or the local agency’s Conflict of Interest Code. This form is called a Statement of Economic Interests, more commonly known as a “Form 700.”

III. **Individuals Required to File a Form 700 and Disclosure Categories**

The individuals who are required to make financial disclosures (on a Form 700) pursuant to the local agency’s Conflict of Interest Code are those officials or employees of a public agency whose positions involve the making or participation in the making of decisions which may foreseeably have a material effect on any financial interest of the official. These individuals are referred to as “designated employees,” (though this term also broadly encompasses public officials such as school board members who are not technically “employees” of the agency) and their positions must be identified in the public agency’s Conflict of Interest Code. (Gov. Code § 87302.)

Government Code section 87200 also establishes a second group of public officials or employees who are required to make financial disclosures. They are individuals who “manage public investments.” At a minimum for school districts, this usually includes each member of the governing board. In addition, the Superintendent, as the chief executive officer of the school district, and often the Chief Business Officer or holder of a similar position, likely also manage public investments and are subject to this requirement. This generally would not include, however, site-level administrators such as Principals. As with the first group of individuals, these disclosures are made on a Form 700.
IV. Disclosure Categories

Designated employees must be assigned a “disclosure category” in the agency’s Conflict of Interest Code. (Gov. Code § 87302(a).) A disclosure category is a description within the local agency’s Conflict of Interest Code of the types of financial interests that designated officials and employees must disclose on their Form 700. Each disclosure category must be tailored to the financial interests potentially implicated by the specified position. For example, the following category may be appropriate for a designated position charged broadly with negotiating agency-wide contracts, such as a school district superintendent:

All investments, business positions, and income, including gifts, loans, and travel payments, from sources that provide leased facilities, goods, equipment, vehicles, machinery, or services, including training or consulting services of the type utilized by the XYZ School District.

By contrast, an individual who holds a position which only has contracting authority for a specific department, such as maintenance and operations, may have a disclosure category that is tailored to require the same disclosures, but only with respect to services of the type utilized by the maintenance and operations department.

Officials who manage public investments are required to broadly report financial interests like other state and local officials designated in Section 87200. Parameters for these disclosures are contained in the Form 700 instructions.

Individual Board members and Delegates will need to check their specific reporting obligations in order to determine whether any income or gifts they may receive from ACSA come within the applicable disclosure categories and must be reported.

V. Form 700 Reporting Requirements

All individuals holding designated positions and public officials who manage public investments must file a Form 700 annually, on or before April 1 of each year for the previous calendar year. (Note: The reporting period is the calendar year, not the fiscal year; i.e. the filing deadline for financial interests between January 1, 2019, and December 31, 2019, is April 1, 2020. (Gov. Code § 87203; 2 CCR § 18723.)) Most filers must also file a Form 700 within 30 days of assuming or leaving office. (Gov. Code § 87202; 2 CCR § 18723.)

The “economic interests” reportable on a Form 700 fall into two general categories: (1) investments, including investments in stocks, real property, and business entities; and (2) income, including loans, business positions, and gifts.

A. Gifts

Of particular significance for ACSA Board members and Delegates with respect to their service on the Board and Leadership Assembly, is that “gifts” are defined as a form of income under the PRA. (Gov. Code § 82030(a).) There are a number of disclosure obligations related to gifts. A “gift” is defined as “any payment that confers a personal benefit on the recipient, to the extent that consideration of equal or greater value is not received.” (Gov. Code § 82028(a) [emphasis
added. Under this broad definition, gifts include, but are not limited to, meals, drinks, and entertainment. In addition, travel and lodging expenses paid directly or reimbursed to Board members and/or Delegates by ACSA are also subject to the gift provisions. (Gov. Code § 89506.) The burden is on the public official or employee, i.e., Board member and/or Delegate, to show that a payment is not a gift by reason of receipt of consideration of equal or greater value. (Ibid.)

Under the PRA, gifts received by a public official with a fair market value of $50 or more must be reported on the official’s Form 700. (2 CCR § 18940(c)-(d).) Gifts are aggregated, meaning that if an official receives six meals valued at $30 each over the course of the reporting period, for example, these meals must be reported because they equal $50 or more in the aggregate. Lastly, although not a Form 700 reporting issue, please note that the limit on gifts is $500 per calendar year from a single source. If an official receives gifts that add up to $500 or more in the aggregate during any 12 month period (this is a rolling 12 months that may include portions of more than one reporting period), this will result in a prohibited conflict of interest and require that the official recuse him- or herself from any matters relating to the source of the gift. (Gov. Code § 89503; 2 CCR § 187302(B)(8.1) and 18940.2(a).) (Note: The gift limit is adjusted annually; the annual gift limit of $500 is in effect for the period January 1, 2019, to December 31, 2020. (Gov. Code § 18940.2(a).)

ACSA recognizes that its Board members and Delegates provide valuable services to the organization and its members, and that such services frequently require travel throughout the state and time away from one’s regular job duties. In light of this, ACSA Board members and Delegates are regularly provided with meals, lodging, and occasional drinks and entertainment during the times when they are required by virtue of service to ACSA to attend meetings and conferences. For example, ACSA frequently provides continental breakfasts and box or buffet-style lunches for Board members and Delegates during Board and Leadership Assembly meetings. At such times as ACSA provides Board members and/or Delegates these items during working sessions (which may be through the provision of such meals, etc. directly, or through reimbursement of expenses for these items), ACSA has received the opinion from outside counsel that Board members and Delegates are providing adequate consideration in the form of their service to the organization as they are actively engaged in the provision of services to the organization in return for these modest expenditures. Therefore, it is the opinion of outside counsel that these items are not gifts, the value of which would be subject to disclosure on a Form 700. As set forth above, however, the burden is on the public official or employee to establish that adequate consideration has been provided. Therefore, Board members and Delegates should bear in mind that there may be instances in which the item provided by ACSA could be determined to exceed the approximate value of the consideration, and are advised to consult with legal counsel or the FPPC if necessary to determine whether the value of an item (or the incremental portion thereof) that exceeds the values of the services provided to ACSA) must be reported.

There are, in addition, a range of events that are held by ACSA which Board members, Delegates, and/or ACSA members generally are invited to attend, not all of which may be for the primary purpose of rendering services to the organization. In contrast to the meetings described above, for any events when ACSA provides complimentary meals, drinks, entertainment, or other payments during such times as services as a Board member or Delegate are not being
actively provided (i.e., for social gatherings and events), those payments would be considered gifts to the extent that adequate consideration is not otherwise provided and would be subject to disclosure on Schedule D of Form 700. For example, social dinners organized and paid for by ACSA, which may include the attendance of Board members’ and/or Delegates’ spouses/significant others, would likely be considered “gifts” for purposes of the PRA because, while business of the organization may be casually discussed, it is generally not being conducted at such events. Notably, these events may also be paid for or co-sponsored by various vendors, which must also be identified on a Form 700.

Notably, if ACSA provides Board members’ and/or Delegates’ spouses benefits such as meals, drinks, entertainment, etc., the value of such items would likely be considered “gifts” to the Board member and/or Delegate, and therefore would be reportable on a Form 700. This is because the PRA defines financial interests to include that of a public official’s spouse, and the same exception for adequate consideration being provided in return for the payment will not be applicable to spouses who do not provided services to ACSA and its members. (See Gov. Code § 87103; 2 CCR § 18700(c)(6) and 18702.5(a).)

Please note, while this constitutes ACSA’s interpretation of the application of the relevant gift provisions to your service to ACSA, it is ultimately the FPPC that is charged with determining whether income and gifts are properly reported. Additionally, while this document is intended to provide general guidelines, ACSA cannot provide a bright line rule related to the provision of gifts, as the analysis is highly fact-based and depends on all of the circumstances involved. In light of the serious penalties (discussed below) associated with violations of the PRA, and the fact that exceptions to the conflict of interest prohibitions are narrowly construed, ACSA has provided what it believes is conservative advice to its Board members and Delegates in order to help guard against potential misreporting. Accordingly, if a Board member or Delegate is ever unclear about whether an item or payment they have received from ACSA is considered a gift, Board members and Delegates are advised to consult with the FPPC directly and/or with appropriate legal counsel.

The FPPC assists public officials with questions related to their Form 700 filing obligations. Pursuant to Government Code section 83114, if an official makes full and honest disclosure in a request for formal written advice from the FPPC, the official will have a defense to prosecution or criminal sanction resulting from reliance on the FPPC’s advice. The FPPC will also assist with specific questions when the Form 700 instructions do not provide adequate direction. Officials may call (866) ASK-FPPC to speak with a consultant. Additionally, officials may seek the assistance of their legal counsel; however, reliance on the advice of counsel will not operate as a defense to prosecution or penalties in the same manner as reliance on FPPC guidance.

VI. **Consequences for Failing to File Form 700**

Serious penalties in the form of administrative, civil, and even criminal sanctions may result if designated employees or other individuals who manage public investments violate any provision of the PRA or their agency’s Conflict of Interest Code. In addition, a decision of the agency made in violation of the disqualification provisions of the PRA or the agency’s Conflict of Interest Code may be set aside as void pursuant to Government Code section 91003.
The FPPC, the Attorney General, or the local district attorney may initiate investigations for suspected violations of the PRA. Administrative enforcement proceedings initiated by the FPPC may result in fines of up to $5,000 per violation. (See Gov. Code § 83115-83116.5.) Administrative enforcement proceedings must be commenced within five years after the date on which the violation occurred. (Gov. Code § 91000.5.) This limitations period may be extended if the omission on the Form 700 was “fraudulently concealed.” (Id.)

A “knowing” or “willful” violation of the PRA may result in a misdemeanor conviction and a fine up to the greater amount of $10,000 or three times the amount the official failed to report. (Gov. Code § 91000(a)-(b).) In addition to these potential sanctions, these forms are signed under penalty of perjury and courts have held false statements or significant omissions on a Form 700 constitute perjury. (See e.g. People v. Wong (2010) 186 Cal.App.4th 1433, 1452; People v. Hedgecock (1990) 51 Cal.3d 395, 406-407.)

Penalties also apply to late filings of Form 700. Specifically, a person who files a Form 700 after the deadline is liable for a late fine of $10 per day up to a maximum of $100. (Gov. Code § 91013.) The FPPC also publishes “Late Fine Guidelines,” which address when the FPPC may entertain a request for a late fee waiver from an individual. For example, the FPPC will consider a request to waive the payment of a late filing fine if the request is based on “good cause,” such as medical incapacitation. It is the responsibility of the agency’s filing officer to notify all filers prior to the filing deadline that the Form 700 is due, and to promptly send follow-up notification to any agency officials or employees who have not properly completed their Form 700 by the deadline. (2 CCR § 18115.) However, lack of such notification does not relieve an individual from his or her obligation to timely and properly file the Form 700.

The filing officer for the local agency must retain original Form 700 filings for seven years. (Gov. Code § 81009.) Once filed, Form 700s are public records accessible to any member of the public who requests them. (Gov. Code § 81008.) As such, an individual may request these directly from the local educational agency pursuant to the California Public Records Act (“CPRA,” Gov. Code § 6250 et seq.).
LEADERSHIP ASSEMBLY

TO: Members of the Leadership Assembly

SUBJECT: Cultural Differences and Classroom Implications

Background

How one is socialized have a major effect on how he or she sees and processes the world around them. Bobbie Harro discusses this in the research around the Cycle of Socialization about how we are raised by those who care and love us, and how we are reinforced and bombarded with messages we receive from institutions and various culture through conscious and unconscious levels. "Similarly, some students do poorly in school because the linguistic, social, and cultural nature of the home environment does not prepare them for the work they will be required to do in school," according to Matthew Lynch. This is based on what Lynch calls the Cultural Deficit Theory.

It is clear that these cultural differences and understandings can make schooling more difficult for some students. It is important that we address these issues as they have a profound effect on the classroom experience for teachers and students. We all know what happens when there is a lack of understanding and/or cultural sensitivity for students who are different from the adults who serve them. California suspension data is an example of how simple misunderstandings and/or cultural differences can lead to racial disproportionality in discipline. A recent Center for American Progress report found teachers of color make up just 18 percent of public school teachers, while students of color are nearly 50 percent of the children they educate. It is important that diverse classrooms are safe and inclusive, furthermore, we must clearly recognize that cultural differences have an impact on teacher and student relationships and student learning.

Sources:
1. https://www.americanprogress.org/issues/race/reports/2014/05/04/88962/teacher-diversity-revisited/

Participants will be able to:

• learn and play a fun game, while also learning a valuable lesson
• examine cultural differences and understand classroom implications
• discuss the importance of assessing what students already possess and to help connect with students in a way that builds trust, opens lines of communication, and motivates for success.
• Watch a video and practice using Gorski’s Equity Literacy Case Analysis approach to identify an inequity in the system.

Call to Action

As educators, we have a responsibility to create cultural inclusive learning environments on our campuses. It will serve educators well to learn the name, face, and story of each of their students. Matthew Lynch discusses in his article “How cultural differences can make school tougher for students” that teachers often expect less from students of certain racial, ethnic, and cultural backgrounds. When teachers expect students to perform poorly, they approach teaching in ways that align with their low levels of expectations. We know that we have amazing teachers and leaders in our education system that care deeply about students, yet we recognize the need to cultivate the hearts and minds of all educators for the good of all students.

Agenda

1. The game of “Barnga”
   a. Having fun playing the game, while learning lessons
   b. Learning to communicate effectively
   c. Learning to work well in a cross-cultural group

2. Debrief the game of “Barnga”
   Table Discussion
   a. What specific real-life situations does this game remind you of?
   b. Choose one of these real-life situations, and ask:
      i. What are the underlying causes of the problems of difficulties?
      ii. What does the game suggest about what to do when you are in a similar situation in the real world?
   c. What did you do during the game which “worked” for you?
   Whole Group Discussion
   a. Prepare to share out what resonated with your table.
      a. How did you feel about being in the space?
      b. What did you learn through this exercise?

3. Review Gorski’s Equity Literacy Case Analysis process

4. Watch video “Immersion”

5. Apply Gorski’s Equity Literacy Case Analysis process to identify an inequity in the video

6. Wrap-up Session - Whole & Table Group -SUMI Protocol
   • S What surprised you about what you heard
   • U How are you understanding the stories that emerged?
   • M What would you “marinate” on based on what you’ve heard?
   • I What was the impact of this experience on you?
LEADERSHIP ASSEMBLY

TO: Members of the Leadership Assembly

SUBJECT: End of Session Legislative Update

ACSA’s Governmental Relations team follows an array of issues that impact the lives of ACSA members and the students you serve. During Leadership Assembly, the GR staff will provide an update on significant legislation that was considered by the California Legislature in 2019.

Some of the significant proposals include:

**SB 328 (Portantino) – School Start Time**

SB 328 prohibits middle schools, including charter schools, from beginning their school day before 8:00 a.m., and high schools, including charter schools, from beginning their school day before 8:30 a.m. SB 328 passed out of the Assembly in the early morning hours just prior to the Legislature adjourned the first half of the 2019-20 legislative session. Members of the Legislature were not vocal about this bill up until voting. In the last days, Sen. Portantino garnered enough support for this bill, which is in its third iteration.

**ACSA Position: OPPOSE**

**AB 1507 (Smith) – Charter School Location**

This bill would remove the authority of a charter school to locate outside of the geographic boundaries of the chartering school district, either temporarily or by stating that a lack of facilities is available. Sen. Portantino pulled the bill into the Senate Appropriations Committee in an effort to try to get the bill author and member of the Assembly Education Committee to vote for SB 328, which she did not. Despite the political tension, AB 1507 passed the Legislature and is on the Governor’s desk. He’s expected to sign the bill given his interest and work on charter school reform.

**ACSA Position: SUPPORT**
AB 1505 (O’Donnell, Bonta, McCarty & Smith) – Charter School Authorization
This bill makes various changes relating to charter school authorizations, appeals, and renewals, and places a two-year moratorium on non-classroom based charter schools. Gov. Newsom’s Office negotiated the bill with the Legislature, CTA and the California Charter School Association. The negotiated version of 1505, while not perfect, is certainly a step in the right direction. AB 1505 is the biggest charter reform since the inception of the Charter School Act and allows a chartering authorizer to consider the community and neighborhood impact (including fiscal impacts), make changes to the renewal process, and limit appeals to the State Board. ACSA has engaged with the Governor’s office on the bill and is urging a signature.

ACSA Position: SUPPORT

AB 218 (Gonzalez) – Statute of Limitations Regarding Childhood Sexual Assault
ACSA is part of a coalition that worked tirelessly to amend the bill to remove the indefinite claims, treble damages, and strict liability provisions of the bill, but the subject matter has made amending the bill extremely difficult. The Department of Finance agrees with our significant cost assessment and formally opposes the bill. The Governor’s Office has indicated he will sign the bill. We are advocating, along with our partners, for a veto.

ACSA Position: OPPOSE

AB 48 (O’Donnell) - Kindergarten-Community Colleges Public Education Facilities Bond Acts of 2020 and 2022
ACSA was part of a working group that was tasked to work through details for a new facilities bond. The Governor’s Office waited 2 weeks prior to the end of session to weigh in with a proposal we could not support. AB 48 became a compromise bill that places a $15 billion Preschool-Higher Ed facilities general obligation bond on the March 2020 ballot, with $9 billion for K-12. This bill holds the largest passage rate for a bond at 78 aye votes with members typically opposed voting aye. We fully expect the Governor’s signature.

ACSA Position: SUPPORT

SB 478 (Rubio) - Commission on Teacher Credentialing
ACSA’s Human Resource Council is behind the idea for the bill introduction and supports the idea that a human resource administrator will result in a better understanding of the decisions proposed or made by the CTC and their impact at the school site and district level. SB 478 replaces one public member of the Commission on Teacher Credentialing with one human resource administrator. An ACSA sponsored bill, signed by the Governor, and will become law on January 1, 2020.

ACSA Position: SPONSOR
SB 419 (Skinner) - Willful Defiance
This bill, signed by Gov. Newsom, expands the permanent elimination of suspensions for “willful defiance” from K-3 to K-5 and eliminates 6-8th grade willful defiance suspensions until July 1, 2025.
ACSA Position: SUPPORT

AB 751 (O’Donnell) - Pathways to College Act
This bill would require the Superintendent of Public Instruction to approve a nationally recognized high school assessment like the SAT or ACT for which schools could administer in lieu of the 11th grade Smarter Balanced Summative Assessment Consortium test.

Call to Action: Please contact the Governor’s Office and ask for a Signature of passage. Please call the Governor’s Office at 916-445-2841.
ACSA Position: SPONSOR
LEADERSHIP ASSEMBLY

TO: Members of the Leadership Assembly

SUBJECT: Overview of ACSA Professional Development Survey Results

Educational Services will present the initial results of the all member survey which is aimed at determining members interest in the following areas: content for extending learning through professional development, type and format of digital learning experiences preferred, and interest in contributing to creation and content for new professional learning programs. The survey will also help to further the development of action items in support of the strategic plan objectives.

The survey was delivered in two parts based on input from external research professionals. Part I, focused on value and satisfaction was delivered 4/5/19 and closed 4/26/19 and Part II (focusing on ACSA's professional development offering) launched the week of April 29th and will close 5/19/19. Initial results will be shared this Leadership Assembly with further detail following.
LEADERSHIP ASSEMBLY

TO: Members of the Leadership Assembly

SUBJECT: IgnitED Conference Update

This past September, ACSA and the National Association of School Superintendents convened for our annual federal advocacy conference. This year ACSA members joined other administrators from several different states to convene on Capitol Hill. Participants heard from former Secretary for Education, Ron Paige, and several LBGTQ students on their experience matriculating through our K12 schools. This year we lobbied on the Equality Act, special education funding for infants and toddlers, STEM education and federal spending on education.

Adonai Mack will provide an overview of advocacy day.
LEADERSHIP ASSEMBLY

TO: Members of the Leadership Assembly

SUBJECT: Overview of Learning Policy Institute’s Research, California’s Positive Outliers

The Learning Policy Institute (LPI) researcher, Dion Burns, will present on the Institute’s new report, California’s Positive Outliers: Districts Beating the Odds.

The report identified more than a hundred California school districts in which students across racial/ethnic groups are outperforming similar students in other districts on new math and reading assessments that measure higher order thinking and performance skills. Many of these districts also are closing the gap on a range of other outcomes, including graduation rates. As part of the presentation, Pamela Seki, from Long Beach Unified School District, one of the districts participating in the research, will address the comprehensive approach that were utilized to support the positive change.
LEAD WELL | Equity & Excellence is the theme of this year’s Leadership Summit to be held at the Hyatt Regency San Francisco, November 7-9. This premier event will address the interests and issues of all members with top-name speakers, concurrent sessions designed by ACSA members and state and national educational leaders, and other special events including a Wednesday night welcome reception, Thursday ESS luncheon, the President’s Celebration and Association Awards Presentation.

Keynote Speakers: Keynote speakers include Ronen Habib from EQSchools, Ruja Benjamin, sociologist and an Associate Professor in the Department of African American Studies at Princeton University; and Naomi Tutu, activist and daughter of Desmond Tutu.

New This Year: We’re going to be holding a speakeasy-style reception in the exhibit hall following the general session on Thursday. We’ll be working with our exhibitors and sponsors to include some gaming events in the hall as well as live music, food and drinks during the reception.

Other features: Women’s Breakfast on Friday featuring keynote speaker Gayle Garbolino-Mojica, County Superintendent of Schools, Placer County Office of Education, Keynote luncheons Friday with keynote spakers Tyrone Howard, a pre-conference on Social Emotional Learning, Awards Program and dinner followed by live music by the Mighty Untouchables, and we will also be hosting a Fun Run/Walk on Saturday morning.

Online and Mobile Schedule: Attendees will be able to access the schedule ahead of time and plan their Summit Experience. They will also be able to use this application onsite using their mobile phones or iPads. Go to https://2019acsaleadershipsummit.sched.com/ for a complete list of the Summit offerings.
TO: Members of the Leadership Assembly
SUBJECT: Membership Report as of August 31, 2019

Attached is the status report for month ending August 31, 2019.

Overall membership count for month ending August 2019 has reached 17,862. Although we are still 363 members less as compared to August of last year, our Regular members are still in the lead with 154 members more as compared to August 2018. On a monthly comparison, we had 386 new and reinstated members in August as compared to 307 new and reinstated members the same time last year.

ACSA staff and leaders continue to collaborate to grow membership, which we believe will yield positive results as the year progresses.
# ACSA Statewide Membership Report

As of August 31, 2019

<table>
<thead>
<tr>
<th>Reporting Period</th>
<th>Retired</th>
<th>Associate</th>
<th>Student</th>
<th>Regular</th>
<th>Consolidated</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members as of 08/31/19</td>
<td>2,449</td>
<td>491</td>
<td>568</td>
<td>12,978</td>
<td>1,376</td>
<td>17,862</td>
</tr>
<tr>
<td>Members as of 08/31/18</td>
<td>2,468</td>
<td>542</td>
<td>579</td>
<td>12,824</td>
<td>1,812</td>
<td>18,225</td>
</tr>
<tr>
<td>One year net change</td>
<td>- 19</td>
<td>- 51</td>
<td>- 11</td>
<td>+ 154</td>
<td>- 436</td>
<td>- 363</td>
</tr>
</tbody>
</table>

## Activity Detail

### 08/01/19 - 08/31/19

<table>
<thead>
<tr>
<th>Activity</th>
<th>08/31/19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total on 07/31/19</td>
<td>17,610</td>
</tr>
<tr>
<td>New Members</td>
<td>+ 266</td>
</tr>
<tr>
<td>Terminations</td>
<td>- 133</td>
</tr>
<tr>
<td>Reinstates</td>
<td>+ 120</td>
</tr>
<tr>
<td>Total on 08/31/19</td>
<td>17,862</td>
</tr>
</tbody>
</table>

### 08/01/18 - 08/31/18

<table>
<thead>
<tr>
<th>Activity</th>
<th>08/31/18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total on 07/31/18</td>
<td>18,060</td>
</tr>
<tr>
<td>New Members</td>
<td>+ 208</td>
</tr>
<tr>
<td>Terminations</td>
<td>- 140</td>
</tr>
<tr>
<td>Reinstates</td>
<td>+ 99</td>
</tr>
<tr>
<td>Total on 08/31/18</td>
<td>18,225</td>
</tr>
</tbody>
</table>
LEADERSHIP ASSEMBLY

TO: Members of the Leadership Assembly

SUBJECT: Financial Reports for the Twelve Months Ending June 30, 2019 and for the Two Months Ending August 30, 2019

Attached are the financial reports for the twelve months ending June 30, 2019, and the financial reports for the two months ending August 31, 2019.
Association of California School Administrators and Affiliates

Financial Statements for the

Twelve Months

Ending June 30, 2019
<table>
<thead>
<tr>
<th>INDEX</th>
<th>PAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summary of Operating Financial Results</td>
<td>1-3</td>
</tr>
<tr>
<td>Table of Financial Operating Results – ACSA/FEA, SASS, NASS</td>
<td>4</td>
</tr>
<tr>
<td>SCHEDULES – Statement of Financial Position</td>
<td></td>
</tr>
<tr>
<td>A. ACSA/FEA</td>
<td>5</td>
</tr>
<tr>
<td>B. SASS</td>
<td>6</td>
</tr>
<tr>
<td>SCHEDULES – Operating and Short-Term Reserves</td>
<td></td>
</tr>
<tr>
<td>A. ACSA/FEA</td>
<td>7</td>
</tr>
<tr>
<td>B. SASS</td>
<td>8</td>
</tr>
<tr>
<td>ACSA/FEA Membership Trends Chart</td>
<td>9</td>
</tr>
<tr>
<td>ACSA/FEA and SASS Companies Trends</td>
<td>10</td>
</tr>
<tr>
<td>ACSA/FEA Functional Expenses</td>
<td>11</td>
</tr>
<tr>
<td>SASS Functional Expenses</td>
<td>12</td>
</tr>
<tr>
<td>ACSA/FEA Budget Update- Revenue</td>
<td>13</td>
</tr>
<tr>
<td>ACSA/FEA Budget Update- Expenses</td>
<td>14</td>
</tr>
<tr>
<td>SASS Budget Update- Revenue and Expenses</td>
<td>15</td>
</tr>
</tbody>
</table>
Association of California School Administrators

Summary of Financial Operating Performance
For the Twelve Months ending June 30, 2019

<table>
<thead>
<tr>
<th></th>
<th>Year-to-Date Actuals</th>
<th>Annual Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Current</td>
<td>Prior year</td>
</tr>
<tr>
<td>ACSA/FEA Companies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>$22,875,000</td>
<td>$22,535,000</td>
</tr>
<tr>
<td>Expenses</td>
<td>22,537,000</td>
<td>22,077,000</td>
</tr>
<tr>
<td>Net Change</td>
<td>338,000</td>
<td>458,000</td>
</tr>
<tr>
<td>SASS Companies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>80,000</td>
<td>$110,000</td>
</tr>
<tr>
<td>Expenses</td>
<td>46,000</td>
<td>84,000</td>
</tr>
<tr>
<td>Net Change</td>
<td>34,000</td>
<td>26,000</td>
</tr>
<tr>
<td>NASS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>28,000</td>
<td>$47,000</td>
</tr>
<tr>
<td>Expenses</td>
<td>89,000</td>
<td>308,000</td>
</tr>
<tr>
<td>Net Change</td>
<td>(61,000)</td>
<td>(261,000)</td>
</tr>
<tr>
<td>Combined Net change in</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Member’s Equity</td>
<td>$311,000</td>
<td>$223,000</td>
</tr>
</tbody>
</table>
NOTES TO THE FINANCIAL SUMMARY
For the Twelve Months ending June 30, 2019

Revenue

ACSA/FEA
ACSA/FEA revenues were $22,875,000 for the twelve-month period ending June 30, 2019, which is a $340,000 increase over last year, and $917,000 over annual budget of $21,958,000. This was due to having 13 months of revenues instead of 12 months because of revenues being historically booked one month in arrears. In June, an additional month of revenue was accrued to match revenue to the current period.

Membership revenue amounted to 61% of total revenue. Registration fees provided 25% of total revenue. There were 17,457 members at year end, which is a net decrease of 529 members over last year. However, due to change in accounting policy, total revenue exceeded our annual budget by 4%.

SASS
SASS revenues were $80,000 for the year, a decrease of $30,000 from last year, and $85,000 less than budget. This is due to market value fluctuations in our investment portfolio.

NASS
NASS revenues were $28,000 for the year, a decrease of $19,000 from last year due to the Social Justice Program moving under the Equity Department, and $5,000 under the budget.

Expenses

ACSA/FEA
ACSA/FEA expenses were $22,537,000 for the twelve-month period, an increase of $460,000 over last year's expenses of $22,077,000.

SASS
SASS expenses were $46,000 for the year, $38,000 less than prior year, and $62,000 under budget of $108,000.

NASS
NASS expenses were $89,000, $219,000 less than prior year, and $10,000 under annual budget of $99,000.
Net change to Members' Equity

ACSA/ FEA
ACSA/ FEA was at a net profit of $338,000 for the fiscal year. This is a decrease of $120,000 over last year's net change of $458,000.

SASS
SASS had a net loss of $34,000 for the year, an increase of $8,000 over prior year.

NASS
NASS came in at a net loss of $61,000, $200,000 better than prior year's net loss of $261,000.

Combined
Combined net change in Members' Equity for the fiscal year ending Junet 30, 2019 was at a net profit of $311,000. This was a $88,000 increase over prior year's net profit of $223,000. This was primarily driven by the accounting change in ACSA/FEA.

Operating and Short-term Reserves

Current Ratio
Our current ratio as of June 30, 2018, was 2.60, which exceeds the current ratio required by our revolving line of credit of 1.50.
### Association of California School Administrators
#### Summary of Financial Operating Performance
For the Twelve Months ending June 30, 2019

<table>
<thead>
<tr>
<th></th>
<th>Year-to-Date Actuals</th>
<th>Revised Annual Budget</th>
<th>(Under) Over</th>
<th>Budget Run Rates</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Current</td>
<td>Prior year</td>
<td>Difference</td>
<td></td>
</tr>
<tr>
<td><strong>A-CSA/FEA Companies</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>$22,772,000</td>
<td>$22,535,000</td>
<td>$237,000</td>
<td>$21,958,000</td>
</tr>
<tr>
<td>Expenses</td>
<td>22,537,000</td>
<td>22,077,000</td>
<td>460,000</td>
<td>21,802,000</td>
</tr>
<tr>
<td>Net Change</td>
<td>235,000</td>
<td>458,000</td>
<td>(223,000)</td>
<td>106,000</td>
</tr>
<tr>
<td><strong>SASS Companies</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>80,000</td>
<td>$110,000</td>
<td>(30,000)</td>
<td>165,000</td>
</tr>
<tr>
<td>Expenses</td>
<td>46,000</td>
<td>84,000</td>
<td>(38,000)</td>
<td>108,000</td>
</tr>
<tr>
<td>Net Change</td>
<td>34,000</td>
<td>26,000</td>
<td>8,000</td>
<td>57,000</td>
</tr>
<tr>
<td><strong>MASS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>28,000</td>
<td>$47,000</td>
<td>(19,000)</td>
<td>33,000</td>
</tr>
<tr>
<td>Expenses</td>
<td>89,000</td>
<td>308,000</td>
<td>(219,000)</td>
<td>99,000</td>
</tr>
<tr>
<td>Net Change</td>
<td>(61,000)</td>
<td>(261,000)</td>
<td>200,000</td>
<td>(66,000)</td>
</tr>
<tr>
<td><strong>Combined</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>22,880,000</td>
<td>22,692,000</td>
<td>188,000</td>
<td>22,156,000</td>
</tr>
<tr>
<td>Expenses</td>
<td>22,672,000</td>
<td>22,469,000</td>
<td>203,000</td>
<td>22,009,000</td>
</tr>
<tr>
<td>Net Change</td>
<td>$208,000</td>
<td>$223,000</td>
<td>$(15,000)</td>
<td>$163,000</td>
</tr>
</tbody>
</table>
ASSOCIATION OF CALIFORNIA SCHOOL ADMINISTRATORS  
FOUNDATION FOR EDUCATIONAL ADMINISTRATION  
COMBINED STATEMENT OF FINANCIAL POSITION  
AS OF JUNE 30, 2019

### ASSETS

**CURRENT ASSETS**
- Cash and cash equivalents $1,974,156
- Cash designated - Technology projects
- Inventory 21,488
- Accounts receivable 1,489,642
- Other Current Asset 208,743
- Prepaid expenses 119,786

Total Current Assets 3,813,819

**FIXED ASSETS**
- Land, buildings and equipment 19,340,424
- Accumulated Depreciation & Amortization (9,853,782)

Total Fixed Assets, net of Depreciation 9,486,632

**INVESTMENT IN SUBSIDIARY** 5,000

**TOTAL ASSETS** $13,305,447

### LIABILITIES & FUND BALANCE

**CURRENT LIABILITIES**
- Accounts Payable $474,171
- Deferred revenue 497,353
- Other Liability 198,763
- Current portion of long term obligations 299,721

Total Current Liabilities 1,470,008

**LONG TERM DEBT NET OF CURRENT PORTION** 3,546,354

**Total LIABILITIES** 5,016,362

**FUND BALANCE** 8,289,085

**TOTAL LIABILITIES AND FUND BALANCE** $13,305,447
## ASSETS

### CURRENT ASSETS
- Cash and cash equivalents: $2,510
- Other Investments: $1,817,582
- Accounts receivable: -
- Other Current Asset: -
- Prepaid expenses: -
- **Total Current Assets**: $1,820,092

### INVESTMENT IN SUBSIDIARY

### TOTAL ASSETS
- **Total**: $1,820,092

## LIABILITIES & FUND BALANCE

### CURRENT LIABILITIES
- Accounts Payable: $3,063
- Deferred revenue: -
- Other Liability: -
- Current portion of long term obligations: -
- **Total Current Liabilities**: $3,063

### LONG TERM DEBT NET OF CURRENT PORTION
- **962,568**

### TOTAL LIABILITIES
- **965,631**

### FUND BALANCE
- **854,461**

### TOTAL LIABILITIES AND FUND BALANCE
- **Total**: $1,820,092
ASSOCIATION OF CALIFORNIA SCHOOL ADMINISTRATORS FOUNDATION FOR EDUCATIONAL ADMINISTRATION AVAILABLE OPERATING AND SHORT TERM RESERVES AS OF JUNE 30, 2019

ASSETS

OPERATING RESERVES

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$1,974,156</td>
</tr>
<tr>
<td>Cash designated - Technology projects</td>
<td>$21,488</td>
</tr>
<tr>
<td>Inventory</td>
<td>$1,489,642</td>
</tr>
<tr>
<td>Accounts receivable</td>
<td></td>
</tr>
<tr>
<td>Member receivable</td>
<td></td>
</tr>
<tr>
<td>Prepaid expenses/other assets</td>
<td>$328,529</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td>$3,813,815</td>
</tr>
</tbody>
</table>

Deduct

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td>$474,171</td>
</tr>
<tr>
<td>Accrued expenses</td>
<td>$878,547</td>
</tr>
<tr>
<td>Deferred revenue</td>
<td>$497,353</td>
</tr>
<tr>
<td>Current portion of long term obligations</td>
<td>$299,721</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td>$2,146,802</td>
</tr>
</tbody>
</table>

Total Operating Reserves $1,667,013

SHORT TERM RESERVES

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investments</td>
</tr>
</tbody>
</table>

Total Short Term Reserves

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Operating and Short Term Reserves</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,667,013</td>
</tr>
</tbody>
</table>

7
OPERATING RESERVES

Cash and cash equivalents 2,510
Cash designated - Technology projects
Inventory
Accounts receivable
Member receivable
Prepaid expenses/other assets
Subtotal 2,510

Deduct
Accounts Payable 3,063
Accrued expenses
Deferred revenue
Current portion of long term obligations
Subtotal 3,063

Total Operating Reserves (553)

SHORT TERM RESERVES

Investments 1,817,582

Total Short Term Reserves 1,754,256

Total Operating and Short Term Reserves 1,753,703
ACSA Membership
As of June 2019
## REVENUE 2018-2019

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Fees</td>
<td>$13,051,972</td>
<td>-</td>
<td>-</td>
<td>$13,510,000</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Registration Fees</td>
<td>5,805,462</td>
<td>5,705,780</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Subscription Fees</td>
<td>759</td>
<td>108,099</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Publication Income</td>
<td>6,829</td>
<td>11,400</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Advertising Income</td>
<td>649,395</td>
<td>513,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>CALSA Reimbursement</td>
<td>12,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Rental Income</td>
<td>664,995</td>
<td>651,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Sponsorship Fees</td>
<td>294,157</td>
<td>14,350</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Exhibit Fees</td>
<td>522,738</td>
<td>619,780</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Corporate Partners Fees</td>
<td>651,301</td>
<td>775,655</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Carp Affiliates Gifts in Kind</td>
<td>83,080</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Investment Income</td>
<td>332</td>
<td>63,826</td>
<td>165,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Other Income</td>
<td>130,095</td>
<td>243,188</td>
<td>16,867</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$22,875,076</strong></td>
<td><strong>$22,156,073</strong></td>
<td><strong>$80,193</strong></td>
<td><strong>$22,875,076</strong></td>
<td><strong>$22,156,073</strong></td>
<td><strong>$80,193</strong></td>
</tr>
</tbody>
</table>

## REVENUE 2017-2018

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Fees</td>
<td>$12,583,464</td>
<td>0</td>
<td>$0</td>
<td>$12,475,829</td>
<td>0</td>
<td>$52,368</td>
</tr>
<tr>
<td>Registration Fees</td>
<td>5,756,138</td>
<td>5,964,025</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Subscription Fees</td>
<td>122,604</td>
<td>112,236</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Publication Income</td>
<td>5,051</td>
<td>19,464</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Advertising Income</td>
<td>629,927</td>
<td>666,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>CALSA Reimbursement</td>
<td>12,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Rental Income</td>
<td>712,586</td>
<td>589,872</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Sponsorship Fees</td>
<td>143,250</td>
<td>36,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Corporate Partners Fees</td>
<td>860,605</td>
<td>837,482</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Carp Affiliates Gifts in Kind</td>
<td>5,000</td>
<td>444,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Investment Income</td>
<td>1,998</td>
<td>102,338</td>
<td>125,664</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Other Income</td>
<td>92,257</td>
<td>-</td>
<td>7,397</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$21,895,138</strong></td>
<td><strong>$18,735</strong></td>
<td><strong>$46,803</strong></td>
<td><strong>$21,895,138</strong></td>
<td><strong>$18,735</strong></td>
<td><strong>$46,803</strong></td>
</tr>
</tbody>
</table>
### Program Services

**Assocation of California School Administrators**

**ACSA and FFA Functional Expenses**

**June 30, 2019**

<table>
<thead>
<tr>
<th>Program Services</th>
<th>Prof. Development</th>
<th>Government Relations</th>
<th>Communications</th>
<th>Total Regions</th>
<th>Member Services</th>
<th>Prof. Assistance</th>
<th>Commit- tees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relates to regions</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>2,052,745</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Political contributions</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Business meetings and expenses</td>
<td>2,097,856</td>
<td>78,452</td>
<td>2,506</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Honoraria</td>
<td>486,276</td>
<td>480</td>
<td>343</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Printing and photocopying</td>
<td>70,310</td>
<td>1,333</td>
<td>303,538</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Warehouse</td>
<td>51,123</td>
<td>12,215</td>
<td>192,634</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Telecommunications</td>
<td>209,516</td>
<td>10,421</td>
<td>4,628</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Dues, subscriptions, and fees</td>
<td>42,113</td>
<td>22,012</td>
<td>31,014</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Postage and delivery</td>
<td>18,738</td>
<td>1,125</td>
<td>210,642</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Office supplies</td>
<td>20,669</td>
<td>6,621</td>
<td>4,683</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Office rent</td>
<td>-</td>
<td>3,642</td>
<td>1,960</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Business and general insurance</td>
<td>40,232</td>
<td>41,010</td>
<td>25,157</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Building Ownership maintenance</td>
<td>43,665</td>
<td>44,306</td>
<td>27,534</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Building Ownership Utilities</td>
<td>5,667</td>
<td>26,170</td>
<td>16,504</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Property Taxes for Building</td>
<td>23,837</td>
<td>24,605</td>
<td>14,669</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Depreciation and amortization</td>
<td>67,405</td>
<td>68,727</td>
<td>42,600</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Interest</td>
<td>34,661</td>
<td>35,544</td>
<td>23,244</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Bad Debt</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Other</td>
<td>10,656</td>
<td>5,166</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>7,321,384</td>
<td>2,560,538</td>
<td>2,168,537</td>
<td>2,052,745</td>
<td>2,120,566</td>
<td>1,323,510</td>
<td>218,008</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Financial Services</th>
<th>Executive</th>
<th>Governance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>2,082,406</td>
<td>1,861,598</td>
</tr>
</tbody>
</table>

**Supporting Services**

**Association of California School Administrators**

**ACSA and FFA Functional Expenses**

**June 30, 2018**

<table>
<thead>
<tr>
<th>Program Services</th>
<th>Prof. Development</th>
<th>Government Relations</th>
<th>Communications</th>
<th>Total Regions</th>
<th>Member Services</th>
<th>Prof. Assistance</th>
<th>Commit- tees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relates to regions</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>2,024,271</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Political contributions</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Business meetings and expenses</td>
<td>2,062,603</td>
<td>53,577</td>
<td>1,747</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Honoraria</td>
<td>679,086</td>
<td>14,449</td>
<td>342</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Printing and photocopying</td>
<td>60,737</td>
<td>1,426</td>
<td>282,476</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Warehouse</td>
<td>290,580</td>
<td>6,636</td>
<td>18,795</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Personnel</td>
<td>1,428,970</td>
<td>126,771</td>
<td>166,747</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Professional and contract services</td>
<td>46,222</td>
<td>109,125</td>
<td>77,122</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Telecommunications</td>
<td>31,655</td>
<td>9,991</td>
<td>4,989</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Dues, subscriptions, and fees</td>
<td>45,777</td>
<td>19,665</td>
<td>22,634</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Postage and delivery</td>
<td>45,891</td>
<td>4,792</td>
<td>217,675</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Rental equipment and facilities</td>
<td>26,868</td>
<td>31,081</td>
<td>475</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Office supplies</td>
<td>17,473</td>
<td>7,243</td>
<td>3,258</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Office rent</td>
<td>42</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Business and general insurance</td>
<td>36,213</td>
<td>38,905</td>
<td>24,250</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Building Ownership maintenance</td>
<td>47,111</td>
<td>48,795</td>
<td>29,898</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Building Ownership Utilities</td>
<td>17,454</td>
<td>28,187</td>
<td>17,426</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Property Taxes for Building</td>
<td>21,175</td>
<td>21,891</td>
<td>13,418</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Depreciation and amortization</td>
<td>139,624</td>
<td>139,179</td>
<td>85,434</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Interest</td>
<td>36,340</td>
<td>37,063</td>
<td>22,316</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Bad Debt</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Other</td>
<td>2,014</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>7,512,779</td>
<td>2,755,572</td>
<td>2,038,440</td>
<td>2,024,271</td>
<td>2,499,272</td>
<td>1,419,588</td>
<td>221,861</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Financial Services</th>
<th>Executive</th>
<th>Governance</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>2,189,594</td>
<td>1,806,006</td>
</tr>
</tbody>
</table>
**SASS COMPANIES FUNCTIONAL EXPENSES**

30-Jun-19

<table>
<thead>
<tr>
<th>Expense Category</th>
<th>Member Service</th>
<th>2018-2019 Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Services</td>
<td>$3,200</td>
<td></td>
</tr>
<tr>
<td>Insurance</td>
<td>$42,000</td>
<td>100,000</td>
</tr>
<tr>
<td>Print/Photocopy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taxes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office Supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mail Service</td>
<td>$273</td>
<td></td>
</tr>
<tr>
<td>Gen and Admin</td>
<td>$250</td>
<td></td>
</tr>
<tr>
<td>Others</td>
<td></td>
<td>8,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$45,723</td>
<td>$108,000</td>
</tr>
</tbody>
</table>

**SASS COMPANIES FUNCTIONAL EXPENSES**

30-Jun-18

<table>
<thead>
<tr>
<th>Expense Category</th>
<th>Member Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional Services</td>
<td>$900</td>
</tr>
<tr>
<td>Insurance</td>
<td>$81,595</td>
</tr>
<tr>
<td>Print/Photocopy</td>
<td></td>
</tr>
<tr>
<td>Taxes</td>
<td>$800</td>
</tr>
<tr>
<td>Office Supplies</td>
<td></td>
</tr>
<tr>
<td>Mail Service</td>
<td>$305</td>
</tr>
<tr>
<td>Gen and Admin</td>
<td>$80</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$83,680</td>
</tr>
</tbody>
</table>
### ACSA/FEA Budget Update

(dollars in thousands)

#### Revenue

<table>
<thead>
<tr>
<th>Revenue</th>
<th>June YTD This Year</th>
<th>Full Year Budget This Year</th>
<th>% of Budget</th>
<th>June YDT Last Year</th>
<th>Full Year Actual Last Year</th>
<th>% of Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Fees</td>
<td>14,052</td>
<td>13,510</td>
<td>104.0</td>
<td>13,583</td>
<td>12,476</td>
<td>108.9</td>
</tr>
<tr>
<td>Registration Fees</td>
<td>5,805</td>
<td>5,706</td>
<td>101.7</td>
<td>5,736</td>
<td>5,964</td>
<td>96.2</td>
</tr>
<tr>
<td>Subscription Fees</td>
<td>-</td>
<td>108</td>
<td>-</td>
<td>113</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Publication Income</td>
<td>9</td>
<td>11</td>
<td>81.8</td>
<td>5</td>
<td>19</td>
<td>26.3</td>
</tr>
<tr>
<td>Advertising Income</td>
<td>649</td>
<td>513</td>
<td>126.5</td>
<td>629</td>
<td>666</td>
<td>94.4</td>
</tr>
<tr>
<td>Rental Income</td>
<td>664</td>
<td>651</td>
<td>102.0</td>
<td>713</td>
<td>590</td>
<td>120.8</td>
</tr>
<tr>
<td>Sponsorship Fees</td>
<td>848</td>
<td>634</td>
<td>133.8</td>
<td>143</td>
<td>30</td>
<td>476.7</td>
</tr>
<tr>
<td>Corporate Partners Fees</td>
<td>651</td>
<td>780</td>
<td>83.5</td>
<td>861</td>
<td>837</td>
<td>102.9</td>
</tr>
<tr>
<td>Intercompany Revenue</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Other Income</td>
<td>197</td>
<td>243</td>
<td>81.1</td>
<td>112</td>
<td>556</td>
<td>20.1</td>
</tr>
</tbody>
</table>
## ACSA/FEA Budget Update
(dollars in thousands)

<table>
<thead>
<tr>
<th>Expense</th>
<th>June YTD This Year</th>
<th>Full Year Budget This Year</th>
<th>% of Budget</th>
<th>June YTD Last Year</th>
<th>Full Year Actual Last Year</th>
<th>% of Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries &amp; Benefits</td>
<td>8,854</td>
<td>9,013</td>
<td>0.98</td>
<td>8,700</td>
<td>8,964</td>
<td>0.97</td>
</tr>
<tr>
<td>Professional Service</td>
<td>3,026</td>
<td>2,126</td>
<td>1.42</td>
<td>2,757</td>
<td>2,334</td>
<td>1.18</td>
</tr>
<tr>
<td>Programmer/Computer Srv</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>216</td>
<td>11</td>
<td>19.64</td>
</tr>
<tr>
<td>Rebates</td>
<td>2,123</td>
<td>2,116</td>
<td>1.00</td>
<td>2,024</td>
<td>2,003</td>
<td>1.01</td>
</tr>
<tr>
<td>Bus. Mgt. Exp. &amp; Conf. Fac.</td>
<td>2,588</td>
<td>3,018</td>
<td>0.86</td>
<td>3,258</td>
<td>2,547</td>
<td>1.28</td>
</tr>
<tr>
<td>Honorariums</td>
<td>571</td>
<td>774</td>
<td>0.78</td>
<td>705</td>
<td>718</td>
<td>0.98</td>
</tr>
<tr>
<td>Travel, Meals, &amp; Lodging</td>
<td>1,282</td>
<td>1,589</td>
<td>0.88</td>
<td>1,185</td>
<td>1,846</td>
<td>0.88</td>
</tr>
<tr>
<td>Printing &amp; Photocopy</td>
<td>464</td>
<td>521</td>
<td>1.45</td>
<td>416</td>
<td>301</td>
<td>1.28</td>
</tr>
<tr>
<td>Bld. Maint, Util. Insurance</td>
<td>601</td>
<td>431</td>
<td>1.39</td>
<td>430</td>
<td>611</td>
<td>0.70</td>
</tr>
<tr>
<td>Property Tax for Bld</td>
<td>131</td>
<td>140</td>
<td>0.94</td>
<td>131</td>
<td>120</td>
<td>1.09</td>
</tr>
<tr>
<td>Telephone</td>
<td>159</td>
<td>166</td>
<td>0.96</td>
<td>208</td>
<td>64</td>
<td>3.25</td>
</tr>
<tr>
<td>Rent</td>
<td>50</td>
<td>10</td>
<td>5.00</td>
<td>46</td>
<td>187</td>
<td>0.25</td>
</tr>
<tr>
<td>Main./Leases Equip.</td>
<td>225</td>
<td>281</td>
<td>0.80</td>
<td>192</td>
<td>182</td>
<td>1.05</td>
</tr>
<tr>
<td>Mail Service</td>
<td>290</td>
<td>261</td>
<td>1.11</td>
<td>373</td>
<td>251</td>
<td>1.49</td>
</tr>
<tr>
<td>Depreciation</td>
<td>370</td>
<td>726</td>
<td>0.51</td>
<td>777</td>
<td>865</td>
<td>0.90</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>120</td>
<td>145</td>
<td>0.83</td>
<td>214</td>
<td>129</td>
<td>1.66</td>
</tr>
<tr>
<td>Dues, Subs., Books</td>
<td>233</td>
<td>133</td>
<td>1.75</td>
<td>201</td>
<td>198</td>
<td>1.02</td>
</tr>
<tr>
<td>G &amp; A</td>
<td>496</td>
<td>342</td>
<td>1.46</td>
<td>220</td>
<td>463</td>
<td>0.48</td>
</tr>
<tr>
<td>Interest</td>
<td>191</td>
<td>215</td>
<td>0.89</td>
<td>212</td>
<td>229</td>
<td>0.93</td>
</tr>
<tr>
<td>Others</td>
<td>68</td>
<td>270</td>
<td>0.25</td>
<td>86</td>
<td>1,812</td>
<td>0.05</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>21,952</strong></td>
<td><strong>22,077</strong></td>
<td><strong>0.99</strong></td>
<td><strong>22,351</strong></td>
<td><strong>23,335</strong></td>
<td><strong>0.96</strong></td>
</tr>
</tbody>
</table>
## SASS Budget Update

(dollars in thousands)

### Revenue & Expenses

<table>
<thead>
<tr>
<th>REVENUE</th>
<th>June YTD</th>
<th>Full Year Budget</th>
<th>% of Budget</th>
<th>June YDT</th>
<th>Full Year Actual</th>
<th>% of Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This Year</td>
<td>This Year</td>
<td></td>
<td>Last Year</td>
<td>Last Year</td>
<td></td>
</tr>
<tr>
<td>Insurance</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Administrative support</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Service Fees</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Investment Income</td>
<td>63</td>
<td>165</td>
<td>38.18</td>
<td>102</td>
<td>125</td>
<td>81.60</td>
</tr>
<tr>
<td>Other</td>
<td>17</td>
<td>-</td>
<td>-</td>
<td>7</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>80</strong></td>
<td><strong>165</strong></td>
<td><strong>48.48</strong></td>
<td><strong>109</strong></td>
<td><strong>125</strong></td>
<td><strong>87.20</strong></td>
</tr>
</tbody>
</table>

### Expenses

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>June YTD</th>
<th>Full Year Budget</th>
<th>% of Budget</th>
<th>June YDT</th>
<th>Full Year Actual</th>
<th>% of Actual</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This Year</td>
<td>This Year</td>
<td></td>
<td>Last Year</td>
<td>Last Year</td>
<td></td>
</tr>
<tr>
<td>Professional Service</td>
<td>3</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Insurance</td>
<td>42</td>
<td>100</td>
<td>42.00</td>
<td>82</td>
<td>187</td>
<td>43.85</td>
</tr>
<tr>
<td>Mail Service</td>
<td>0</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Interest Expense</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Others</td>
<td>0</td>
<td>8</td>
<td>2.50</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>46</strong></td>
<td><strong>108</strong></td>
<td><strong>42.13</strong></td>
<td><strong>82</strong></td>
<td><strong>187</strong></td>
<td><strong>43.85</strong></td>
</tr>
</tbody>
</table>
Association of California School Administrators and Affiliates

Financial Statements for the

Two Months

Ending August 31, 2019
### Association of California School Administrators

**Summary of Financial Operating Performance**

For the Two Months ending August 31, 2019

<table>
<thead>
<tr>
<th></th>
<th>Year-to-Date Actuals</th>
<th>Annual Budget</th>
<th>(Under)</th>
<th>Budget Run Rate</th>
<th>Current</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Current</td>
<td>Prior year</td>
<td>Difference</td>
<td></td>
<td>Current</td>
</tr>
<tr>
<td><strong>ACSA/FEA Companies</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>$2,410,000</td>
<td>$3,128,000</td>
<td>$(718,000)</td>
<td>$22,664,000</td>
<td>$20,254,000</td>
</tr>
<tr>
<td>Expenses</td>
<td>2,900,000</td>
<td>3,100,000</td>
<td>$(200,000)</td>
<td>22,593,000</td>
<td>19,695,000</td>
</tr>
<tr>
<td>Net Change</td>
<td>(490,000)</td>
<td>28,000</td>
<td>$(518,000)</td>
<td>71,000</td>
<td>541,000</td>
</tr>
<tr>
<td><strong>SASS Companies</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>$(22,100)</td>
<td>61,000</td>
<td>$(83,100)</td>
<td>25,000</td>
<td>$(47,100)</td>
</tr>
<tr>
<td>Expenses</td>
<td>7,000</td>
<td>8,000</td>
<td>(1,000)</td>
<td>44,000</td>
<td>(37,000)</td>
</tr>
<tr>
<td>Net Change</td>
<td>(29,100)</td>
<td>53,000</td>
<td>(82,100)</td>
<td>(19,000)</td>
<td>(10,100)</td>
</tr>
<tr>
<td><strong>MASS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>$282,000</td>
<td>$282,000</td>
<td>0</td>
<td>63,000</td>
<td>$(68,000)</td>
</tr>
<tr>
<td>Expenses</td>
<td>13,000</td>
<td>9,000</td>
<td>4,000</td>
<td>98,000</td>
<td>$(80,000)</td>
</tr>
<tr>
<td>Net Change</td>
<td>(15,000)</td>
<td>(9,000)</td>
<td>(6,000)</td>
<td>(32,000)</td>
<td>17,000</td>
</tr>
<tr>
<td><strong>Combined</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>$2,853,900</td>
<td>$3,189,000</td>
<td>$(335,100)</td>
<td>$22,752,000</td>
<td>$20,364,100</td>
</tr>
<tr>
<td>Expenses</td>
<td>2,922,000</td>
<td>3,117,000</td>
<td>$(195,000)</td>
<td>22,732,000</td>
<td>$(19,810,000)</td>
</tr>
<tr>
<td>Net Change</td>
<td>$(68,100)</td>
<td>72,000</td>
<td>$(460,100)</td>
<td>$20,000</td>
<td>$(554,100)</td>
</tr>
</tbody>
</table>

74
Association of California School Administrators  
Summary of Financial Operating Performance  
For the Two Months ending August 31, 2019

<table>
<thead>
<tr>
<th></th>
<th>Year-to-Date Actuals</th>
<th>Annual Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Current</td>
<td>Prior year</td>
</tr>
<tr>
<td>ACSA/FEA Companies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>$2,410,000</td>
<td>$3,128,000</td>
</tr>
<tr>
<td>Expenses</td>
<td>2,900,000</td>
<td>3,100,000</td>
</tr>
<tr>
<td>Net Change</td>
<td>(490,000)</td>
<td>28,000</td>
</tr>
<tr>
<td>SASS Companies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td>(22,100)</td>
<td>61,000</td>
</tr>
<tr>
<td>Expenses</td>
<td>7,000</td>
<td>8,000</td>
</tr>
<tr>
<td>Net Change</td>
<td>(29,100)</td>
<td>53,000</td>
</tr>
<tr>
<td>NASS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Expenses</td>
<td>15,000</td>
<td>9,000</td>
</tr>
<tr>
<td>Net Change</td>
<td>(15,000)</td>
<td>(9,000)</td>
</tr>
</tbody>
</table>

Combined Net change in Member's Equity  
$ (534,100)  $ 72,000  $ 20,000
NOTES TO THE FINANCIAL SUMMARY
For the Two Months ending August 31, 2019

Revenue

ACSA/FEA
ACSA/FEA revenues were $2,410,000 for the two-month period ending August 31, 2018, which is a $718,000 decrease over last year, and 11% of annual budget of $22,664,000. This was due to former revenues being booked one month in arrears, instead of accruing revenue for the current period. The reversal of the June accrual in July was the reason for the difference.

Membership totals closed the month at 17,862, which is 363 less than last year.

SASS
SASS revenues were at a $22,100 loss for the two-month period, a decrease of $83,100 from last year. This is due to market value fluctuations in our investment portfolio.

NASS
There is no NASS revenue for the first two months of the fiscal year.

Expenses

ACSA/ FEA
ACSA/ FEA expenses were $2,900,000 for the first two months of the fiscal year, a decrease of $200,000 from last year’s expenses of $3,100,000.

SASS
SASS expenses were $7,000 for the two months, $1,000 less than prior year.

NASS
NASS expenses were $15,000, $6,000 more than prior year.
Net change to Members’ Equity

ACSA/ FEA
ACSA/ FEA was at a net loss of $490,000 for the two-month period. This is a decrease of $518,000 over last year’s net change of $28,000, due to the accrual reversal referenced above.

SASS
SASS had a net loss of $29,100 for the two months, an $82,100 decrease over prior year.

NASS
NASS came in at a net loss of $15,000, $6,000 less than prior year.

Combined
Combined net change in Members’ Equity for the two-month period ending August 31, 2019 was at a net loss of $534,100. This was a $606,100 decrease over prior year’s net change of $72,000. This was primarily driven by the accounting change in ACSA/FEA.
ACSA Membership
As of August 2019