

2022

CCBE Year-in-Review



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EXECUTIVE SUMMARY

Executive Summary

STRATEGIC HIGHLIGHTS – CCBE COMMITS TO “STEP” UP

The California County Boards of Education (CCBE) serves members who are engaged and tenacious champions of equity and excellence in public education. CCBE’s mission is to serve and represent the county boards of education community by strengthening and promoting local governance to enable county board members to help every California student succeed. CCBE is a dynamic network of members dedicated to maximizing educational opportunities for all.

“STEP” stands for four pillars of the CCBE 2022-27 Strategic Plan, a dynamic set of objectives developed by the CCBE Board of Directors at its Spring 2022 retreat in Half Moon Bay, California. The strategic plan arose from a spirited discussion at the 2021 retreat in Sacramento, where CCBE board members challenged the executive committee to develop a multiyear strategy focused on delivering value to CCBE members in the areas of training, activation & CCBE member engagement, and policy presence (or “TAP” for short). Subsequently, sustainability was added as a fourth pillar, focusing on our financial and volunteer resources. Going forward, the work of the executive committee and the standing committees of CCBE will be aligned to the four pillars of the strategic plan, now known by the acronym STEP:

1. **Sustainability:** The focus of this pillar is to sustain the growth and stability of CCBE's mission, programs, employment, and ongoing operations.
2. **Training & Toolkits:** The Training pillar will engage members with training opportunities that are timely and relevant to their role as county board members. Includes the work of the Annual Conference Committee and the Professional Development Committee, and the County Board Governance Initiative.
3. **Engagement & Activation:** The goal of this pillar is to encourage members to be engaged with each other and within the state. Hector has been working with CSBA staff on the county articles in the monthly CSBA newsletter. Includes the work of the Nominations Committee.
4. **Policy Advocacy:** Stay well-engaged in education legislation. Includes the work of the Policy Platform Committee and the CSBA delegation to the CSBA Legislative Committee.

FINANCIAL HIGHLIGHTS: SUSTAINABILITY

As a result of the Computer Science Project Grant, the 2021-22 fiscal year resulted in a healthy net gain. We are always mindful of our responsibility to carefully shepherd our resources, but our commitment to you – our members – goes beyond saving money. CCBE’s ongoing re-investment in advocacy, professional development, and training opportunities continues to be an essential focus now and in the future. For example, as part of the CCBE County Board Governance Initiative, CCBE in 2022 prioritized and invested a modest portion of our financial reserve in publishing *The Trustee Handbook*, a fully updated guide to governance for county boards of education. Through surveys and evaluations, we consistently learn that our members want more professional training opportunities and services that help provide them with the tools and skills they need to do their job and meet their roles and responsibilities. As we move forward, we will

EXECUTIVE SUMMARY

continue to provide ongoing education through board development, new and experienced board member workshops, and our annual conference.

MEMBER SERVICES HIGHLIGHTS: *TRAINING, ENGAGEMENT & POLICY ADVOCACY*

CCBE membership gives county board members access to the resources that help them fulfill their unique and complex governance and leadership roles. CCBE is here to help its members, whether a member has been part of the education community for many years or is just starting. Please stay tuned for an updated release in early 2023 of the CCBE President's video, which will outline the many benefits received as a member of CCBE. For more information, I encourage you to visit www.theccbe.org/en/Membership.

The Policy Platform Committee devoted much of the year to identifying an issue of public policy that CCBE could, potentially in concert with our partners, the California County Superintendents, proactively champion as a legislative initiative in 2023. This work arose from a commitment made by the CCBE Board in its 2022 retreat in Half Moon Bay to take the initiative (rather than solely act reactively) in lobbying on behalf of our members on matters of public policy.

The Professional Development Committee in March hosted the 2022 County Board Governance Workshop in Sacramento. Attendees exceptionally well received this in-person event. Speakers included former CCBE President Dr. Ramon Flores, Dr. Emily Thomforde (computer science coordinator for the California Department of Education and CCBE's former computer science project consultant), Kevin Gordon and Jack O'Connell of Capitol Advisors, and Gayle Garbolino-Mojica, Placer County Superintendent of Schools, among many other luminaries in governance and public policy.

The CCBE Board of Directors in May moved nimbly to support revisions to the state budget in the May Revise that resulted in augmenting LCFF funding for county offices with an ongoing \$101.2 million in the Proposition 98 General Fund. Acting together with the California County Superintendents, CCBE submitted to the legislature a letter of support (see attached), ultimately achieving a clearly successful outcome.

The Annual Conference Planning Committee in September put together an outstanding (and fully in-person) conference experience. Attendance exceeded expectations at what has become the *go-to* annual gathering of county board members. Thematically, this year's Annual Conference content sought to "empower county board members to serve in challenging times." For the first time, the event also featured (as an optional benefit for attendees) an exceptionally well-received crisis communications workshop with a special focus on television interview skills.

The County Board Governance Initiative in December successfully brought forth a fully re-imagined governance guide: *The Trustee Handbook*. The Handbook is not a mere update of our prior volumes on governance. Instead, it represents the first edition of a new approach to the topic, incorporating elements of prior CCBE and CCSESA publications, to be sure, but also adding a lot of unique content and commentary focused on the contemporary questions facing county board members and superintendents.

We realize that it is crucial to the students in your county that the professional growth of policymakers continues to occur and that continuing education plays a critical role in ensuring all members are aware of the many changing parts of education policy. Governing can be challenging, and we continue to identify and

EXECUTIVE SUMMARY

develop new ways to support board members in this endeavor. It is vital for the board and the county superintendent to work together as a team. We want to provide all our members with expanded learning opportunities that support the work of board members at the local level.

LOOKING BACK

The Executive Committee started the year with a productive planning retreat, where we worked on the continuing development of the 2022-27 “STEP” Strategic Plan at the direction of the Board of Directors, and with staff, members, CSBA, and our other partners. In March, the Board of Directors was able to meet in person in Half Moon Bay, where they were able to fully develop the four pillars of the STEP Strategic Plan, and to engage in rich discussions, reviewing the growth from past years and challenges that continue to face California County Boards of Education. Meanwhile, much work continued behind the scenes to ensure our continued ability to deliver services to our members. For example, the Bylaws Committee developed “housekeeping” amendments to the CCBE Bylaws to ensure governance best practices, and Acting Treasurer Michelle de Werd stepped in, with the support of John McPherson as assistant treasurer, to ensure we ended the year with a positive fund balance. Though there is always room for improvement, one can’t look back without recognizing that CCBE had a transformative year, thanks in no small part to the years of hard work by all our prior executive committee and board members, and thanks especially to our amazing program manager, Samantha Archey.

LOOKING AHEAD

I want to thank you for your commitment to CCBE, big or small. It has been a great honor to be a part of CCBE’s continued growth and our ongoing efforts to serve all of you well. The diversity of our organization is one of our greatest assets. We learn from each other by working together. As we forge ahead in 2023, we recognize the significant opportunities that will shape public education well into the future. While many challenges remain, CCBE will continue to build on this foundation of success and focus on the complex, meaningful work that will have a lasting, positive impact on the students we serve and our organization for years to come. Thank you.

Joe E. Ross
CCBE President

SUSTAINABILITY: FINANCIAL HIGHLIGHTS

Sustainability: Financial Highlights

The Fiscal Year the Board approved the 2021-22 budget of Directors at its December 3, 2020, meeting. Throughout the year, adjustments were made in various operational expenses to reflect anticipated expenses during the 2021-22 fiscal year.

- Income: \$223,147.00
- Expenses: \$208,918.00
- Net Income (Loss): \$14,229.00
- Net Reserve Cash Balance: \$210,016.00

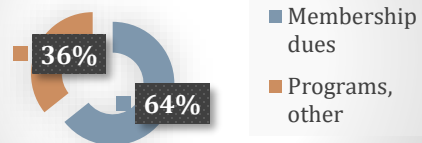
At its December 2, 2021, meeting, the Board of Directors approved the Fiscal Year 2021-22 budget with no membership dues increase. The 2021-22 CCBE membership includes 55 county offices of education. The budget is projected to be a balanced budget.

The budget is a living document that will change over the course of the year. The Treasurer and Executive Committee will be kept informed of the need for changes to the budget in between meetings of the Board of Directors. In addition, the board will receive budget revision reports at scheduled meetings.

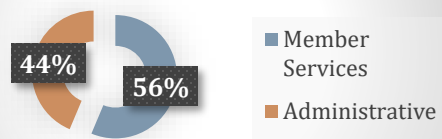
CCBE's financial condition continues to be strong and healthy, with a strong reserve balance.

FINANCIAL STRENGTH AND STABILITY

2021-22 REVENUES



2021-22 Expenses



TRAINING & TOOLKITS

Training & Toolkits

MEMBER DEVELOPMENT AND TRAINING

CCBE's 2022 Annual Conference successfully convened an in-person event on September 9-11, 2022, at the Hyatt Regency Hotel in Monterey, CA. More than 167 attendees attended this year's conference. This conference is an excellent opportunity for county board members from across the state to network, share best practices, and better understand critical issues that impact county offices of education and the students they serve. We were thrilled to present our members with vital information that addressed the unique issues faced by county boards of education and the students they do during these unprecedented times. Programming highlights included three general sessions: The Political Landscape Impacting Schools with Capitol Advisors; Leading Forward for Transformation Change for the Future Education We Can't Predict with the CCEE COE, Matt Navo; and Getting it Together While We All Get Together panel discussed the plans for expanded mental health services. In addition, the General Membership session and twelve breakout sessions on advocacy and community engagement, county board core, equity and opportunity in rural California, funding and human capital, leadership through shared governance, and wellness safety and learning.

This year's CCBE County Board Governance Workshop was held on March 11-12, 2022, at the Embassy Suites by Hilton Sacramento Riverfront Promenade in Sacramento, CA. The workshop was offered as a hybrid program. Fifty-two individuals were registered for the workshop; 6 of those individuals attended the workshop virtually. The session topics included: board governance, board meeting chaos, computer science, voting rights, recall elections, communication policies and best practices, and career technical education. To register, please visit <http://www.theccbe.org/Events/CountyBoardGovernanceWorkshop>.

The MiG County training program is specially designed for county office board members to provide the knowledge and skills to build and support an effective governance structure. MIG COE featured four courses: Foundation of Effective Governance/Setting Direction; Policy and Judicial Review/Student Learning and Achievement; Finance, Facilities and Charter Schools; and Community Relations and Advocacy/Governance integration. Interwoven into each course is a focus on equity and issues specific to COEs. For more information on the MIG COE program, please visit <https://csba.org/TrainingAndEvents/MastersInGovernance>.

The County Board Governance Initiative in December published *The Trustee Handbook: A Guide to Shared Governance for County Boards of Education*. The Trustee Handbook is a guide to shared governance. It is intended to assist California's 341 county boards of education members as they seek to contribute to the education of Californians in each county and throughout the state. Specifically, the purpose of the Handbook is to provide county trustees (sometimes also referred to as board members) with an understanding of the purpose of the county office of education, guidance on the authority of county board members and the county board, insight into the roles and responsibilities of the county board in connection with the governance of the county office of education, as well as the roles and responsibilities of the county

TRAINING & TOOLKITS

superintendent of schools, and guidance on how a county board can best fulfill its roles and meet its responsibilities in collaboration with the county superintendent of schools.

ENGAGEMENT & ACTIVATION

Engagement & Activation

COMMUNICATIONS

CCBE published monthly articles in the CSBA *SchoolNews* that celebrated county best practices and delved into issues county boards faced throughout the state, legislative advocacy topics, and upcoming events. In addition, articles included solutions to several student crises, forums to hear perspectives about race, equity, and social justice, computer science education in California, professional development for county and district board members, and upcoming CCBE events.

GAMUT: SAMPLE BOARD POLICIES & BYLAWS

As part of our strategy to engage our membership, CCBE supports the development of resources that *provide tangible value* to county board trustees. To that end, in collaboration with CSBA, a sample of board policies for use by county boards of education has been made available through CSBA's GAMUT. This year, the CSBA policy department issued regular updates to the country-specific policies in January and July and were sent by email to COE subscribers based on the type of subscription they have. They were also posted to GAMUT Online. For any sample policy questions, ordering information, and a fee schedule, please contact CSBA Policy Services at (800) 266-3382 or email at gamut@csba.org.

Policy Advocacy

ADVOCACY

As a part of continuing towards achieving CCBE advocacy goals, Immediate Past President Rick Shea and three other appointed county board members served on the CSBA Legislative Committee, which is comprised of school district and county boards of education members from across the state representing a diverse membership, CCBE participated in advocating for increased funding for schools and county offices. The four-county board members appointed to serve on this committee provide CCBE with a greater voice on the impact legislation has on county boards of education at the state and federal levels. The four-county board members appointed to serve on this year's committee were Rick Shea, CCBE Immediate Past President (San Diego COE), Janet Wohlgemuth (Monterey COE), Juliana Feriani (Tuolumne COE), and R. Michael Dutton (Los Angeles COE).

The CSBA Legislative Committee frequently met throughout 2022 to discuss and take positions on legislative bills. This year has been an eventful year for county boards of education in California, mostly around the pandemic and its impact on education. We have had opportunities to advocate for (and to expect) increased funding for our schools and county offices. There has also been more attention on digital and technology access for students and teachers. It has been critically important for us to educate our representatives and communities on the essential, integral role that County Boards have in education. We have been dedicated to that effort. We must work as one voice.

In May, CCBE advocated for revisions to the state budget in the May Revise. Collaborating with the California County Superintendents, CCBE submitted a letter to the legislature in support of augmenting LCFF funding for county offices with an ongoing \$101.2 million in the Proposition 98 General Fund. These efforts, we believe, made an impact and contributed to an ultimately successful outcome.

TAKEAWAYS

Takeaways

This was a transformative year for CCBE. We developed our strategic plan and took significant steps in pursuit of each of its four pillars: Sustainability, Training, Engagement, and Policy.

In the area of sustainability, we successfully operated within budget in 2022, adding to the operating surplus of the organization. Training efforts included a total return to in-person events at the Governance Workshop, the Annual Conference, and the development of The Trustee Handbook. As for engagement, CCBE has benefited from the involvement of longstanding and new members in committees and task forces representing all corners of the state. Finally, on the policy front, CCBE helped score a meaningful legislative victory during the May Revise to augment funding for all county offices. In accomplishing all these things, we were extremely fortunate to have the indispensable leadership of our Program Manager, Samantha Archey.

Still, even as we optimistically emerge from two challenging years marked by pandemic and wildfires, the economy is presenting alarming danger signals as we look to the years ahead. Inflation is affecting families across the state just as local education agencies are beginning to consider how and whether pandemic-related infusions of emergency funding will be sustained now that Covid-19 has (hopefully) subsided. Whatever the future brings, CCBE stands ready to support our membership with the resources, training, tools, and support required for county board members to meet our challenges and deliver on our commitment to California's children.

To achieve our mission to help every student succeed, COE Board members must pursue ongoing professional development and training. Therefore, please register and attend the upcoming County Board Governance training event in March 2023.

Please visit www.theccbe.org/Events/CountyBoardGovernanceWorkshop/ for more information and to register for this professional development opportunity.

2022 CCBE EXECUTIVE COMMITTEE

2022 CCBE Executive Committee

JOE ROSS
PRESIDENT



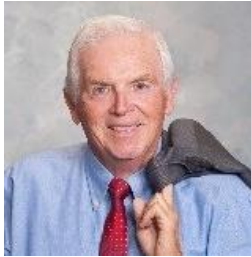
GINA CUCLIS
PRESIDENT-ELECT



HECTOR CAMACHO, JR.
VICE PRESIDENT



RICK SHEA
IMMEDIATE PAST PRESIDENT



MICHELLE DE WERD
ACTING TREASURER



MICHAEL TEASDALE
CSBA DIRECTOR-AT-LARGE,
COUNTY



CCBE Staff

SAMANTHA ARCHEY
PROGRAM MANAGER



2022 BOARD OF DIRECTORS

2022 Board of Directors

Thom McMahon (Humboldt COE), Region 1

Brenda Duchi (Siskiyou COE), Region 2

Dana Dean (Solano COE), Region 3

David Patterson (Placer COE), Region 4

Beverly Gerard (San Mateo COE), Region 5

Shelton Yip (Yolo COE), Region 6

Annette Lewis (Contra Costa COE), Region 7

Juliana Feriani (Tuolumne COE), Region 8

John McPherson (Monterey COE), Region 9

Marcy Masumoto (Fresno COE), Region 10

Rachel Ulrich (Ventura COE), Region 11

Mary Little (Kern COE), Region 12

Rosemary Kamei (Santa Clara COE), Region 15

Laura Mancha (San Bernardino COE), Region 16

Guadalupe Gonzalez (San Diego COE), Region 17

Bruce Dennis (Riverside COE), Region 18

Vacant, Region 20

Monte Perez (Los Angeles COE), Region 21-24

Ad Hoc Member of the Board

Sherry Crawford, (Siskiyou COE), CSBA Region 2 Director

Joaquin Rivera, (Alameda COE), CSBA Director-at-Large, Hispanic

PAST CCBE PRESIDENTS

Past CCBE Presidents

NAME	YEAR	COUNTY
Rick Shea	2021	San Diego County
Janet Wohlgemuth	2020	Monterey County
Dana Dean	2019	Solano County
Bruce Dennis	2018	Riverside County
Amy Christianson	2017	Butte County
Joaquin Rivera	2016	Alameda County
Juliana Feriani	2015	Tuolumne County
Heidi Weiland	2014	El Dorado County
Dr. Ramon Flores	2013	Ventura County
Ken Berrick	2012	Alameda County
Raymond H. Peterson	2011	Sonoma County
Cathie C. Bustos	2010	Madera County
Lynne Craig	2009	Riverside County
Dr. Jack Bedell	2008	Orange County
Susan Hartley	2007	San Diego County
Jennifer Kresge	2006	Napa County
Barbara Thomas	2005	Fresno County
Nick Aguilar	2004	San Diego County
Sara J. Wilkins	2003	Madera County
Janet Lindgren	2002	Ventura County
Mark Cooper	2001	Lake County
Sophia Waugh	2000	Los Angeles County
Elizabeth Parker	1999	Orange County
Beverly Willis-Gerard	1998	San Mateo County
Daniel Clark	1997	Napa County
Jerome Wiggins	1996	Alameda County
Dr. David O. Stine	1995	San Bernardino County
Michaelene D. Wagner	1994	Los Angeles County
Martin Block	1993	San Diego County
Ruth Miller	1992	Riverside County
Robert Pokorny	1991	Solano County
Delores Devenport	1990	Yuba County
Pat Hicks	1989	Lake County
Brenda Brimhall	1988	Butte County
Betty Gibbel	1986 and 1987	Riverside County
Dr. Frank Gladen	1985	Butte County

PAST CCBE PRESIDENTS

Charles Spear	1984	Contra Costa County
Dean McCormick	1982 and 1983	Orange County
Barbara Wheatland	1981	Santa Clara County
Dick Bragg	1979 and 1980	Monterey County
Carol Slavick	1977 and 1978	San Mateo County
Primo Ruiz	1976	Contra Costa County
Otto Zentner	1975	Merced County
Jim Tuttle	1973 and 1974	Imperial County
Lucille Mausey	1971 and 1972	Contra Costa County
Dr. Dan Towler	1969 and 1970	Los Angeles County
Dr. George Muench	1967 and 1968	Santa Clara County
Ruth Harris	1965 and 1966	San Bernardino County
Paul Madsen	1963 and 1964	Santa Clara County
Ruth Colwell	1961 and 1962	Los Angeles County
Dr. John Kenney	1959 and 1960	Sonoma County